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# PeopleSoft Enterprise Customer Relationship Management 9 Supplemental Installation Guide

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**July 2006**

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# About This Documentation

This preface discusses:

- Audience
- Related Documentation

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**Note.** This guide is designed to direct you through a basic installation of Oracle's PeopleSoft Enterprise Customer Relationship Management (CRM). It is not a substitute for the database administration manuals provided by your relational database management system (RDBMS) vendor, the network administration manuals provided by your network vendor, or the installation and configuration manuals for additional component products used with PeopleSoft products.

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**Note.** Required updates to this installation documentation are provided in the form of Required at Install incidents, which are available on PeopleSoft Customer Connection. In addition, specific installation steps for Oracle's PeopleSoft Enterprise PeopleTools and other applications are provided in separate documents. To find the necessary installation documentation, go to PeopleSoft Customer Connection, select Site Index, Installation Guides and Notes, and then look under the subcategory for your applications.

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**Note.** Before proceeding with your installation, check PeopleSoft Customer Connection to ensure that you have the latest version of this installation guide for the correct version of PeopleSoft PeopleTools.

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## Audience

This guide is written for the individuals responsible for installing and administering Oracle's PeopleSoft environment. We assume that you are familiar with your operating environment and RDBMS and that you have the necessary skills to support that environment. You should also have a working knowledge of SQL. You should have completed at least one PeopleSoft introductory training course (particularly the Server Administration course) and have a basic understanding of the PeopleSoft system. Probably the most important component in the installation and maintenance of your PeopleSoft system is your onsite expertise. Only qualified and experienced individuals should attempt to install PeopleSoft. If you have any doubts as to whether your onsite staff is capable of successfully completing an installation, contact your PeopleSoft representative.

---

## Related Documentation

To install third-party products for use with PeopleSoft products, including those products that are packaged with your PeopleSoft shipment, you should refer to the documentation provided with those products, as well as this documentation.

For reference information about PeopleSoft PeopleTools, you may want to consult the following books:

- *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration:* This book includes information on configuring the PeopleSoft application server and supported web servers, data integrity tools, database level auditing, and PeopleTools utilities.

- *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Security Administration:* This book includes information on setting up and modifying user access to PeopleSoft applications, and defines the various IDs and passwords used in installation.
- *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Data Management:* This book includes information on PeopleSoft administrative utilities, such as Configuration Manager, Data Mover, Data Archive Manager, and so on.
- *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleCode Language Reference:* This book includes reference information on the PeopleCode language, such as built-in functions, classes, meta-SQL, system variables, and so on.
- *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleCode Developer's Guide:* This book includes general information about the PeopleCode editor, the Component Processor, the data buffers, and how to use specific functions and classes.
- *Reporting and Analysis Tools:* For information on PeopleSoft's reporting and analysis tools, see the PeopleSoft Enterprise PeopleTools 8.48 PeopleBooks on Crystal Reports for PeopleSoft, PS/nVision, PeopleSoft Query, PeopleSoft Tree Manager, PeopleSoft Process Scheduler, and PeopleSoft Cube Manager.
- *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Designer:* This book includes information about the main tool for developing PeopleTools applications.
- *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Global Technology:* This book includes information on the role of PeopleTools in the globalization of PeopleSoft applications.
- *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Engine:* This book includes information on the PeopleSoft proprietary batch programming tool.

For reference information on your particular application, refer to the documentation for your application.

# CHAPTER 1

## Installing CRM 9 Applications

This chapter discusses:

- Understanding the CRM Applications Installation
- Installing PeopleTools and Creating the CRM Database
- Setting Up the CRM Database
- Configuring an FTP Server for Storing Attachments
- Setting the Starting Values for Auto-Numbered Fields
- Installing the PeopleSoft Enterprise Mobile Agent
- Configuring CTI
- Activating the Basic Data Summary and Messaging Mechanism

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### Understanding the CRM Applications Installation

This guide explains the steps necessary to install Oracle's PeopleSoft Enterprise Customer Relationship Management (CRM) 9 applications. You perform the steps in this guide after you have successfully completed the installation of PeopleSoft PeopleTools, as described in the PeopleSoft Enterprise PeopleTools 8.48 Installation guide for your database platform.

See *PeopleSoft Enterprise PeopleTools 8.48 Installation (for your database platform)* PeopleSoft Customer Connection, (Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes, Enterprise, PeopleTools).

Oracle uses application productivity packs to deliver cumulative fixes and minor enhancements between service packs of an application major or minor release. These application productivity packs are particularly useful for customers upgrading or implementing a new release who want to ensure that they have the latest updates and fixes before or shortly after go-live. The advantages of application productivity packs include:

- Frequency of delivery—application productivity packs are delivered quarterly for the latest release.
- Delivery mechanism—you order a CD through Customer Care.
- Support provided—all application productivity packs are supported for as long as the major or minor release is supported.

To benefit from the latest product level, Oracle encourages you to apply service packs or application bundles as they become available. If you fall behind on application bundles and cannot wait for the next service pack, the productivity pack provides an opportunity to obtain all the latest updates and fixes on one CD.

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**Note.** You should consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on PeopleSoft Customer Connection to determine which PeopleBooks you should include in your installation for the PeopleSoft Enterprise Customer Relationship Management (CRM) products that you are implementing.

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See “PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index,” PeopleSoft Customer Connection, (Support, Documentation, Documentation Updates, Enterprise, Customer Relationship Management, All Products).

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## Task 1-1: Installing PeopleTools and Creating the CRM Database

This section discusses:

- Installing PeopleTools
- Reviewing the Demo Database Sizing
- Creating a Search Collection on UNIX

### Task 1-1-1: Installing PeopleTools

For details about installing PeopleTools, see the PeopleSoft Enterprise PeopleTools 8.48 Installation guide for your database platform.

See *PeopleSoft Enterprise PeopleTools 8.48 Installation (for your database platform)* PeopleSoft Customer Connection, (Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes, Enterprise, PeopleTools).

PeopleSoft Enterprise CRM requires that you specify a Process Scheduler server to be used for workflow processes. If you choose to have a dedicated server for workflow, make sure you set one up as you complete the tasks in the Enterprise PeopleTools 8.48 Installation guide, "Setting up Process Scheduler." Regardless of whether you set up a dedicated server, you must specify a PeopleSoft Enterprise CRM workflow server.

For more information about specifying a workflow server, see the *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Setting Up PeopleSoft Enterprise CRM Workflow."

---

**Note.** PeopleSoft Enterprise CRM applications do not use any COBOL batch processes. If PeopleSoft Enterprise CRM is the only PeopleSoft product line you are installing, you do not need to run PSRUN.MAK, or compile or link any COBOL programs.

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**Note.** PeopleTools release 8.48 with minimum patch level 01 or higher is required at install or upgrade.

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**Note.** Three views related to CRM integrations might not be built using build script. These views should be built manually by opening them in the Application Designer. These views are IMP\_IT\_PROP\_VAL, IMP\_IT\_PROP\_VW, and IMP\_IT\_PR\_LN1\_V.

- 1) Launch Application designer.
  - 2) Include these views in a project (Insert > Definitions in to Project).
  - 3) Build the project (Build > Project, then select Create Views from the pop-up screen).
- 

## Task 1-1-2: Reviewing the Demo Database Sizing

The following table lists the demo database requirements for PeopleSoft Enterprise CRM 9 by RDBMS platform:

Platform	Approximate Database Size
DB2 LUW Ansi	7.0 GB
DB2 LUW Unicode	9.9 GB
DB2 z/OS Ansi	7.1 GB
DB2 z/OS Unicode	7.8 GB
Microsoft SQL Server Ansi	2.0 GB
Microsoft SQL Server Unicode	4.0 GB
Oracle Ansi	23 GB
Oracle Unicode	23 GB
Sybase Ansi	8 GB

---

**Note.** DB2 UDB for z/OS is the official IBM name for the RDBMS. For the sake of brevity, this documentation sometimes refers to DB2 UDB for z/OS as *DB2 z/OS*, and it sometimes refers to DB2 UDB for Linux, UNIX, and Microsoft Windows as *DB2/LUW*.

---



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**Note.** For HP-UX, please verify that your environment variable LC\_ALL has the following setting: american.iso88591.

---

## Task 1-1-3: Creating a Search Collection on UNIX

To enable users to search records and documents in your PeopleSoft Enterprise CRM applications, you must first create a collection in your database. A collection is a set of special directories and files that the search engine uses to find and display source documents that match the criteria that you enter on the search page. You must perform the following steps to configure UNIX servers to locate the PeopleSoft Enterprise CRM search collection.

Link the UNIX utilities sh and chmod into the <PS\_HOME> directory of each Process Scheduler server by entering the following commands:

```
ln -s /bin/chmod $PS_HOME/chmod
ln -s /bin/sh $PS_HOME/sh
```

---

## Task 1-2: Setting Up the CRM Database

This section discusses:

- Loading Active Analytics Framework Data into the CRM 9 System Database

### Task 1-2-1: Loading Active Analytics Framework Data into the CRM 9 System Database

To Load Active Analytics Framework data into PeopleSoft Enterprise CRM 9 databases:

1. Using Data Mover (psdmt.exe), connect to the PeopleSoft Enterprise CRM 9 database using a user ID and password.
2. Run the Data Mover script CRM\_AAF\_IMPORT.DMS found in the %PS\_HOME%\scripts directory against the system (SYS) database.

This script loads the definitions for all the Active Analytics Framework Objects, such as Terms, Policies, Contexts, Action Types, and Trigger Points, into the PeopleSoft Enterprise CRM database.

---

**Note.** The PeopleSoft application provides translations of all end-user objects, including the Data Mover scripts and dat files referenced here, on the "Global Multi-Language" CD. For Active Analytics Framework data, we deliver a dat file equivalent to eocf\_crm\_sysdata.dat for each language. The file names are eocf\_crm\_sysdata\_XXX.dat, where XXX denotes the language code. Run eocf\_crm\_sysdata\_XXX.dms to import this data.

---

---

## Task 1-3: Configuring an FTP Server for Storing Attachments

PeopleSoft Enterprise CRM applications enable you to add notes and attach supporting files to many objects. The attached files are physically stored on an FTP server. While performing this task, you specify the URLs that the applications use to save and retrieve file attachments.

To set the URLs for file attachments:

1. Set up an FTP server for storing the attachments.  
There are no special requirements—any standard FTP server will do.
2. Log into the PeopleSoft application using a user ID that gives you access to the PeopleTools Utilities menu.
3. Select PeopleTools, Utilities, Administration, URLs.
4. Click the Search button on the URL Maintenance search page.

The database includes predefined URL identifiers as shown below. Each of these identifiers represents a particular type of attachment that is available in PeopleSoft Enterprise CRM. The description indicates which PeopleSoft Enterprise CRM product each identifier relates to.

---

**Note.** The URL Identifier RF\_FDM\_LINKS is not related to attachments. It is used in certain integration scenarios between PeopleSoft Enterprise CRM and PeopleSoft Supply Chain.

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See *PeopleSoft Enterprise Integrated FieldService 9 PeopleBook*, “Integrating with PeopleSoft Applications.”

URL Identifier	Description
<a href="#">FEDEX_TRACK</a>	Tracking URL for FedEx
<a href="#">FILEDB</a>	System attachment table
<a href="#">NLP_FTP</a>	NLP ftp site
<a href="#">NLP_KB</a>	NLP knowledge base and sample
<a href="#">NLP_TMP</a>	Temporary files
<a href="#">PPM_MONITOR</a>	PPM Monitor URL
<a href="#">PPM_PPMI</a>	PPM Interface URL
<a href="#">PT_QUERY_TOEXCEL</a>	Query To Excel IScript URL
<a href="#">PW_PRINT_PAGE</a>	Power Pricing Print Page
<a href="#">RA_ATTACHMENTS</a>	Campaign Management Attachment
<a href="#">RA_EXPORT_AUDIENCE</a>	Export audience to file
<a href="#">RAD_GHOST</a>	Standalone Advisor
<a href="#">RB_CORRMGT</a>	Correspondence Management
<a href="#">RB_CORRMGT_EXTRACT</a>	Upload CM files to FTP server
<a href="#">RB_CUST_ATTACH</a>	Customer Attachments
<a href="#">RB_IMP_ATTACH</a>	Import File Location
<a href="#">RB_PERS_NOTES_ATTACH</a>	Person Notes
<a href="#">RB_TRACK_CF</a>	Consolidated Freightways
<a href="#">RB_TSK_ATTACHMENTS</a>	Task Attachments

URL Maintenance Search page

- For each type of attachment you plan to use, select the URL identifier and enter the URL for the FTP server the application should use to access this type of attachment.

See *Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration*, “Using PeopleTools Utilities.”

**URL Maintenance**

**URL Identifier:** RA\_ATTACHMENTS

**\*Description:** Campaign Management Attachment

**\*URL:** ftp://anonymous:anonymous@ADNTP28/CRM/

**Comments:** Campaign Management Attachment

URL Maintenance page

## Task 1-4: Setting the Starting Values for Auto-Numbered Fields

To set the starting value for objects that use the Last Number page (rather than the Auto-numbering page) to generate auto-numbered IDs, complete the following steps:

1. Select Set Up CRM, Common Definitions, Codes and Auto Numbering, Last Numbers.
2. Click the Refresh All Last Numbers button on the Last Number Setup page.

Last Number Setup						
Last Number Types						
Object Type	*Description	*Record (Table) Name	*Field Name	Last Number	Test	
ACTI	Branch Script Action	RC_BS_ACTION	RC_ACTION_ID	300,094		
ATCH	File Attachment	BC_ATTACH	ATTACH_SEQ_NBR	20,001		
BODI	Directory Setup	BO_DIR_SETUP	SEARCH_FIELD_ID	300,004		
BP	Business Project Instance	RC_BP_STATUS	BUS_PROC_INSTAN	20,322		
BROL	Role	BO_ROLE	ROLE_TYPE_ID	20,018		
BRSC	Branch Script	RC_BSCRIPT	SCRIPT_ID	11,000,100		

Last Number Setup page (page 1 of 2)

TOKE	Branch Script Token	RC_TOKEN	RC_TOKEN_ID	300,015		
USG	Usage ID	RBC_USAGE_DFN	RB_USAGE_ID	45		
VARI	Branch Script Variable	RC_VARIABLE	SCR_VAR_ID	300,151		

Add a New Last Number Type      Refresh All Last Numbers

Last Number Setup page (page 2 of 2)

If you want to modify the values later, you can do so using the Last Number page.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting General Options.”

## Task 1-5: Installing the PeopleSoft Enterprise Mobile Agent

If you are installing any of these modules, you must first install the PeopleSoft Enterprise Mobile Agent:

- PeopleSoft Enterprise Mobile FieldService
- PeopleSoft Enterprise Mobile Sales
- PeopleSoft Enterprise Mobile Order Capture

### See Also

*Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Mobile Agent*

*Enterprise PeopleTools 8.48 Installation (for your database platform)*, “Installing PeopleTools Mobile Agent”



---

## Task 1-6: Configuring CTI

PeopleSoft PeopleTools provides a header link, the MultiChannel Console link, for enabling CTI. To make this link visible, you must set up the user as a CTI agent.

See *PeopleSoft Enterprise CRM 9 Multichannel Applications PeopleBook*, “Configuring CTI Application Pages.”



PeopleSoft panel with the MultiChannel Console link

---

## Task 1-7: Activating the Basic Data Summary and Messaging Mechanism

When the PeopleSoft Enterprise CRM system is delivered, the messaging mechanism and basic data summary are inactive. They need to be activated to allow the Online Marketing basic profile population to occur.

---

**Note.** This task is required if you are installing PeopleSoft Marketing or Online Marketing applications. See *PeopleSoft Enterprise CRM 9 Supplemental Installation Guide*, “Installing PeopleSoft Online Marketing.”

---



## CHAPTER 2

# Installing Correspondence Management for CRM Applications

This chapter discusses:

- Understanding Correspondence Management
- Identifying and Configuring FTP Servers
- Copying RTF and Text Template Files to the FTP Server
- Registering the FTP Servers in the Correspondence Management System
- Installing Additional Component Software — XPDF
- Setup Data for Correspondence Management - Install Options
- (Optional) Registering Window Printers
- Defining the CLASSPATH for Java Mail Files

---

## Understanding Correspondence Management

This chapter provides instructions for installing the third-party applications required for correspondence management functionality within PeopleSoft Enterprise Customer Relationship Management (CRM) applications. The following installation related tasks need to be performed only when customers would like to leverage the features provided in correspondence management such as generation of Microsoft Word documents using templates, conversion of Microsoft Word and text files into PDF documents, and printing of documents using network printers.

---

**Note.** You should consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on the PeopleSoft Customer Connection web site to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

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### See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Correspondence Management”

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## Task 2-1: Identifying and Configuring FTP Servers

The FTP servers are used to physically store correspondence templates and finished documents. These servers are also used to store other correspondence management related documents such as intermediary XML files created by the correspondence management specific processes.

You can either store the templates as well as the generated documents in a single FTP server or place them on separate FTP servers. You also have the option to place these files in different folders.

It is possible to also use the FTP server that is intended for storing PeopleSoft Enterprise CRM attachments for storing correspondence related documents. The number of documents, their size, as well as the file management play a role in determining the need for having one or more FTP servers exclusively reserved for correspondence management.

After identifying the server as well as the folders where the documents will be stored, the locations of these servers must be specified in the form of URLs.

The correspondence management functionality works with five types of documents:

- Correspondence templates
- Templates personalized by the agents for a specific correspondence request
- Intermediary XML files created by correspondence management related processes
- Merged documents
- Attachments

If all of these document types are stored under a single folder on a FTP server, you only have to create a single URL in the following procedure. If these documents are stored under different folders on either a single or multiple FTP servers, then you must create a URL for each of these unique locations.

To create the URLs for accessing correspondence management related documents:

1. Set up one or more FTP servers for storing the correspondence management related documents.

---

**Note.** There are no special requirements—any standard FTP server will do.

---

2. Log into PeopleSoft using a user ID that gives you access to the PeopleTools Utilities menu.
3. Select PeopleTools, Utilities, Administration, URLs.
4. For each unique location you plan to use, create a URL identifier and enter the URL for the FTP server the application will use to access this type of document.

This example shows the RB\_CORRMGT URL definition:

The screenshot shows a web form titled "URL Maintenance" with a light blue header. Below the header, there are four labeled fields: "URL Identifier:" with the value "RB\_CORRMGT", "\*Description:" with the value "Correspondence Management", "\*URL:" with the value "ftp://anonymous:anonymous@ADNTTP28/CRM/TEST/", and "Comments:" with the value "Correspondence Management File Attachment URL.". The "Comments:" field is a text area with a vertical scrollbar on the right side.

Example of the delivered RB\_CORRMGT URL definition

See *Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration*, “Using PeopleTools Utilities.”

## Task 2-2: Copying RTF and Text Template Files to the FTP Server

For new Correspondence Management customers:

Templates with associated \*.rtf document files will need to upload these files to the FTP server. To do this, you will need to upload the \*.rtf file to the applicable Template, and save the Template. This action will cause the Correspondence Management system to upload the \*.rtf file and an autogenerated \*.xsl file to the FTP server defined in your RB\_CORRMGT URL definition.

From Setup CRM, Common Definitions, Correspondence, Template, open an existing Template and click the Upload a new file button. Select your \*.rtf file and save the Template. The file will be put on the FTP server.

For existing Correspondence Management customers:

Existing customers will have \*.dot files associated with their Templates. This format is not supported with the new Correspondence Management infrastructure. All \*.dot files will need to be converted to \*.rtf files, and uploaded to the FTP server. To do this:

- Open your existing \*.dot files, and resave them as \*.rtf files. You can keep the same name, just change the file format.
- After the \*.rtf file has been created, open the corresponding Template, upload the new \*.rtf file, and delete the \*.dot file from the Template grid. Save the Template. The \*.rtf file will upload to the FTP server and autogenerated the associated \*.xsl file.

## Task 2-3: Registering the FTP Servers in the Correspondence Management System

This process allows the customer to specify what URL needs to be used by the Correspondence Management system for accessing the various types of documents. URL identifiers can be assigned to following categories:

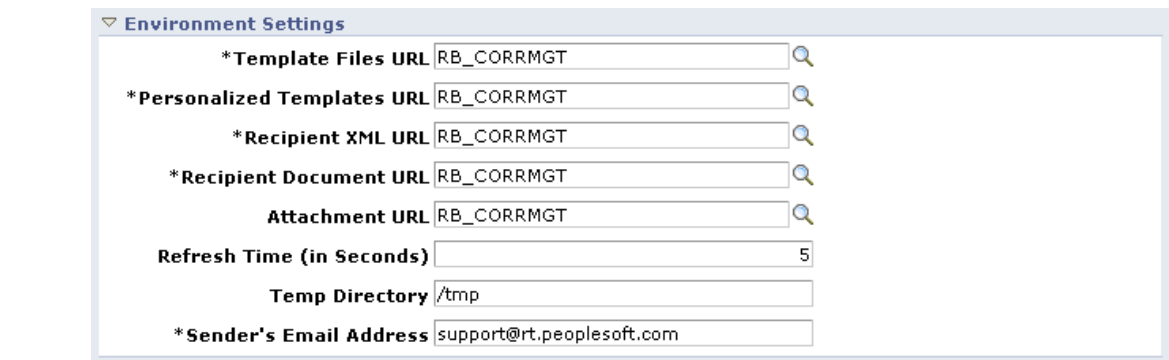
- Template files
- Personalized templates
- Recipient XML
- Recipient document
- Attachment

To register the FTP server for the Correspondence Management system:

1. Select PeopleTools, Utilities, Administration, URLs to define the URL. The system data for the URL is RB\_CORRMGT. If required, modify the URL to point to your FTP.
2. Select Set Up CRM, Common Definitions, Correspondence, Install Options to configure the correspondence management system installation.
3. Enter the following values for the environment settings:

Field	Value
Template File URL	<i>RB_CORRMGT</i>
Personalized Template URL	<i>RB_CORRMGT</i>
Recipient XML URL	<i>RB_CORRMGT</i>
Recipient Doc URL	<i>RB_CORRMGT</i>
Attachment URL	<i>RB_CORRMGT</i>

You can have unique values for each of the URL files. To do this, you need to create more URL definitions to point to the different FTP servers. Then add those URL definitions as the values for each of the URL file fields, as shown in this example:



The screenshot shows a window titled "Environment Settings" with a list of configuration fields. Each field has a text input box and a magnifying glass icon to its right. The fields and their values are as follows:

Field	Value
*Template Files URL	RB_CORRMGT
*Personalized Templates URL	RB_CORRMGT
*Recipient XML URL	RB_CORRMGT
*Recipient Document URL	RB_CORRMGT
Attachment URL	RB_CORRMGT
Refresh Time (in Seconds)	5
Temp Directory	/tmp
*Sender's Email Address	support@rt.peoplesoft.com

Example of additional URL definitions

## See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Defining Settings for Template-Based Correspondence”

## Task 2-4: Installing Additional Component Software — XPDF

XPDF is used for printing Correspondence Management documents. XPDF is free software obtained through the internet. You can either reference PeopleBooks on how to obtain this, or from the Foolabs official web site.

When you have obtained the software, you can install it anywhere on the application server machine. You will update a configuration file to point to the XPDF executable file. This configuration file is called “cm.properties” and is located at: <PS\_HOME>\Appserv\CorrespondenceManagement\config\cm.properties

```
#####
# Correspondence Management Configuration File                                     #
#####

##### Log4j Configuration - Start #####

cm.logFolder = d:/pt846/cm/log/

log4j.rootCategory=DEBUG, A2

# Available levels are DEBUG, INFO, WARN, ERROR, FATAL

log4j.appender.A2=org.apache.log4j.DailyRollingFileAppender

log4j.appender.A2.datePattern='yyyy-MM-dd

log4j.appender.A2.append=true

log4j.appender.A2.layout=org.apache.log4j.PatternLayout

log4j.appender.A2.layout.ConversionPattern=%-5p %d{ISO8601} [%c] - %m%n

##### Log4j Configuration - End #####

##### PDF to PS Conversion Command - Start #####

pdf2ps.command = cmd /c d:/xpdf-3.00pl3-win32/pdftops.exe

##### PDF to PS Conversion Command - End #####
```

The values of concern are cm.logFolder & pdf2ps.command

- cm.logFolder

Replace d:/pt846/cm/log/ with the path of your choice to put all log files relating to Correspondence Management run time data. For each CM transaction, a log file will be generated here with the CM id as the identifier.

- pdf2ps.command

Replace d:/xpdf-3.00pl3-win32/pdftops.exe with the path to your XPDF executable file that you just installed.

---

**Note.** You can install the XPDF software Parser from the Foolabs official web site.

---

## Task 2-5: Setup Data for Correspondence Management

### - Install Options

Two sections on the Install Options page (Setup CRM, Common Definitions, Correspondence, Install Options) are relevant to this functionality. These sections will be populated by default and should not be changed. The sections are:

- Processing Library

This section defines the location of the Java files used for Correspondence Management. These are predelivered files.

- Undelivered Emails Options

This section defines the work list used for emails that are not able to be delivered. When an email fails to be delivered, Correspondence Management will attempt to resend the email. If the next attempt fails, a notification will get sent to the work list so an administrator can investigate.

This example shows the Processing Library and Undelivered Emails Options sections:

**Processing Library**

**RTF Coverage Handler** com.peoplesoft.crm.co.cm.RTFConversionXMLP

**Document Merge Handler** com.peoplesoft.crm.co.cm.MergeProcessorXMLP

**PDF Creation Handler** com.peoplesoft.crm.co.cm.PDFCreationXMLP

**RTF Creation Handler** com.peoplesoft.crm.co.cm.RTFCreationXMLP

**Processing Options**

**Undelivered Emails Options**

**Interval for Resend Attempt** 2 minutes

**Maximum Resend Retries** 3

**\* Worklist** UndeliveredEmailsWorklist

**\* Attachments URL** RB\_CORRMGT

Example of Processing Library and Undelivered Emails Options details

## Task 2-6: (Optional) Registering Window Printers

This installation task is optional, but it will need to be done if the user wants to print Correspondence documents.

By associating printers with your server definitions, you create a list of available printers, which can be selected on the Create Correspondence page. The user's printer selection then determines where the delivery process runs.



To support printing in geographically dispersed locations, it is normally most efficient to define Process Scheduler servers that run the Print Delivery job in each location and to associate the printers with the nearest Process Scheduler server. You can set up servers that are used only for the printing process.

**Note.** The association between the printer and the Process Scheduler server control where the Print Delivery job runs. Therefore, the machine that the Process Scheduler server is on will need to have this printer driver installed.

To register printers:

1. Select Set Up CRM, Common Definitions, Correspondence, Printer Registration.
2. Specify the printer and any location information to inform users where to get the printed document.
3. Save the page.

**Printer Information**

\*Printer Share Name: \\psh-print-e02\E4301P

☒ Active Printer ID 1

\*Printer Location: Next to Ed Baxter's office

Description: Lazer Jet printer used for color printing.

Printer Information page

**Note.** Make sure that the printers listed on this page are mapped to the Process Scheduler server machine and can print from that machine.

## Task 2-7: Defining the CLASSPATH for Java Mail Files

The final step is to ensure that the correct Java Mail class files are used. The class files are located in a JAR file called mail.jar, which is located in the <PS\_HOME>/class directory. This directory contains many JAR files, and some of them also include Java Mail class files. These other versions of Java Mail might not be correct, so ensure that the ones in mail.jar are used at runtime.

To do this, update the CLASSPATH in the Application Server and Process Scheduler Server configuration files as follows to load the mail.jar file first:

*Application Server configuration file*

Located at <PS\_HOME>/appserv/[domain name]/psappsrv.cfg

*Process Scheduler Server configuration file*

Located at <PS\_HOME>/appserv/prcs/[domain name]/psprcs.cfg

In both of these configuration files, you will see a section in the [PSTOOLS] for setting the classpath:

```
;Uncomment JavaVM Shared Library= to use a non-default JVM library.  
;If you do so, you will probably have to set some environment variables to get  
;the JVM to load and run correctly, depending on the operating system and the JVM.  
;For the default JVM library, these environment variables are set by psconfig.sh.  
;JavaVM Shared Library=  
Add to CLASSPATH=
```

This section should be updated to read:

```
;Uncomment JavaVM Shared Library= to use a non-default JVM library.  
;If you do so, you will probably have to set some environment variables to get  
;the JVM to load and run correctly, depending on the operating system and the JVM.  
;For the default JVM library, these environment variables are set by psconfig.sh.  
;JavaVM Shared Library=  
Add to CLASSPATH=<PS_HOME>/class/mail.jar;
```

where <PS\_HOME> is substituted with the physical drive location (for example, c:\PT8.47).

---

**Note.** You will need to restart the servers after making the change.

---

## CHAPTER 3

# Installing PeopleSoft Enterprise Online Marketing 9

This chapter discusses:

- Understanding the PeopleSoft Enterprise Online Marketing Setup
- Prerequisites
- Configuring Online Marketing System Parameters
- Setting Up the FTP Server URL for File Upload
- Setting Up to Bypass SignOn
- Assigning Self-Service Permissions to OLM Users
- Setting Up OLM Internal EIPs
- Installing the Dialog Execution Server on OAS
- Installing the Dialog Execution Server on WebSphere
- Installing the Dialog Execution Server on WebLogic
- Retrieving and Installing JDBC Drivers
- Testing the Dialog Execution Server Installation
- Testing the Email Server
- (Optional) Adding Standalone Dialog Servers, Mailcaster, ERP, and Watchdog
- Setting Up User Installation of the Adobe SVG Plug-In
- Setting Up Profile-Related Parameters
- (Optional) Tuning the System

---

## Understanding the PeopleSoft Enterprise Online Marketing Setup

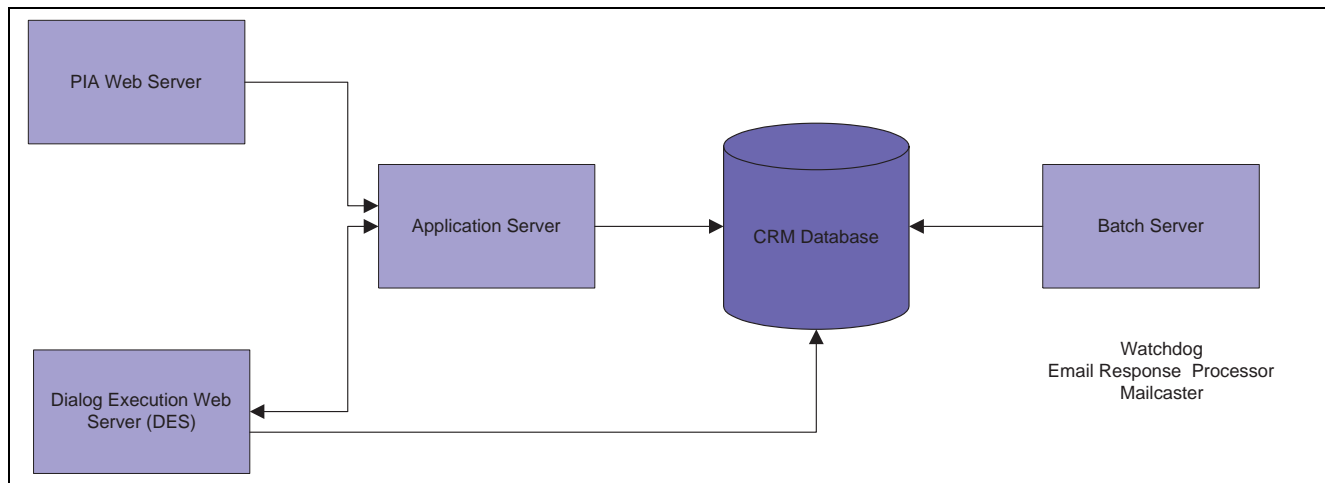
This chapter provides instructions for installing and setting up the PeopleSoft Enterprise Customer Relationship Management (CRM) Online Marketing (OLM) server and related components.

---

**Note.** You should consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on the PeopleSoft Customer Connection website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

---

The following diagram shows the PeopleSoft Enterprise Online Marketing architecture:



PeopleSoft Enterprise OLM architecture

The installation of a complete OLM system includes the following procedures:

1. Install the database (such as Oracle 10g).

---

**Note.** If you are running DB2/UDB from HP-UX and you are going to install a non-unicode CRM database, verify that your environment variable LANG in the HP-UX system has a character set of iso88591. (For example, en\_US.iso88591.) Otherwise, it will cause the JDBC connection error "encoding not supported!" in Online Marketing components. Therefore, before you create the database, you have to change the HP-UX default codepage from Roman8 to the character set that you will use for database, that is, export LANG=en\_US.iso88591.

---

2. Install and configure the PeopleSoft Enterprise CRM 9 database and software (PeopleTools, BEA Tuxedo, and so on).
3. Install a third-party SMTP-compliant email server, for example, LSoft's LSMTP or IronPort.  
Oracle does not provide this software, which must be purchased separately.
4. Install PeopleSoft Enterprise Online Marketing components (Dialog Execution Server, Mailcaster, Email Response Processor, and so on).

## See Also

"Reviewing Tablespaces and Parameters for PeopleSoft Online Marketing"

---

## Prerequisites

Ensure that the following requirements are met before beginning the OLM installation:

- You must have the PeopleSoft Enterprise CRM 9 CD.
- A fully functional PeopleSoft Enterprise CRM environment with PeopleSoft Application Server, BEA Tuxedo, and at least one Tuxedo Batch Server must be installed.
- A PeopleSoft Internet Architecture (PIA) web server must be installed.
- Your application server must have the JOLT publish/subscribe servers configured.

- The Process Scheduler server must be installed.
- You must add the roles of the Dialog administrator *Dialog Administrator* and Process Scheduler administrator *ProcessSchedulerAdmin* to your Administrator userID.
- On UNIX, ensure that you have the correct configuration and kernel settings.

---

**Note.** Before making these changes, check with your UNIX system administrator and hardware vendor to ensure that these recommendations are compatible with your system.

---

The kernel file `/etc/system` should be configured with the following values for file descriptors:

```
* set soft limit on file descriptors
set rlim_fd_cur=1024
* set hard limit on file descriptors
set rlim_fd_max=4096
```

PeopleSoft Online Marketing does not run on all hardware and software platforms supported by PeopleTools. Please ensure that you have compatible hardware and software by reviewing the PeopleSoft CRM 9 hardware and software guide, which is available on Customer Connection.

### See Also

Installing the Dialog Execution Server on Oracle Application Server

Installing the Dialog Execution Server on WebSphere

Installing the Dialog Execution Server on WebLogic

“CRM 9 Hardware and Software Requirements Guide”

---

## Task 3-1: Configuring Online Marketing System Parameters

This task describes the parameters used by the Dialog Execution Server (DES) and Mailcaster. The parameters described here must be set before installing the PeopleSoft Enterprise Online Marketing servers.

---

**Note.** Parameters used by the WatchDog and Email Response Processors are described in the PeopleSoft Enterprise CRM Online Marketing 9 PeopleBook.

---

To set parameter values:

1. Select Set Up CRM, Product Related, Online Marketing, Settings.

Name	*Value
ConnectId	sacrm
ConnectPswd	NzKvcREXBww=
broadcastRequestDESTimeout	30
bulkMailerDropDedup	true
cgiProgramPath	/DCS/
companyBasicsProfileName	Companies
contactBasicsCompanySysIdElementName	Company ID
contactBasicsProfileName	People
dedupIndexSpace	[DEFAULT]
dedupTableSpace	[DEFAULT]
defaultDateFormat	YYYY-MM-DD
defaultTimeFormat	HH:MM AM/PM

**Password Encryption Utility**

Password: 
 Confirm Password:

Encrypt 
 Encrypted Password:

Dialog Execution Server Settings page

- If the parameter is not listed, click the Add button on the Dialog Execution Server Settings page to add the parameter.

**Note.** Some entries are listed as being “PSCipher encrypted”; use the encryption utility at the bottom of the settings page to encrypt these values.

Ensure that these parameters are set:

<b>defaultURLBase</b>	The URL for the Dialog web server (including port number). The format is http://www.foo.com:82.
<b>psAppServerURL</b>	The host and port of BEA Tuxedo. The format is //appserv.foo.com: 9000.
<b>psToolsRel</b>	The tools version of BEA Tuxedo. The format is 8.48.03. After every tools version or tools patch upgrade, this variable should be updated.
<b>psPIAServerURL</b>	The CRM PIA server (including port). The format is http:// <CRM PIA web server:port>.
<b>smtpServerNames</b>	The Mail servers, (semicolon separated) ports and thread counts to be used by the mailcasters. The format is: “mail1.foo.com:25:threads=5;mail2.foo.com:25:threads=5”
<b>psOperatorId</b>	The Application server operator ID.
<b>psOperatorPassword</b>	The Application server operator password (PSCipher encrypted).
<b>psIBLocalNode</b>	The PeopleSoft Integration Broker Local Node.
<b>psIBLocalNodePassword</b>	The PeopleSoft Integration Broker Password (PSCipher encrypted).

<b>dbVendor</b>	<p>The value depends upon the RDBMS:</p> <ul style="list-style-type: none"> <li>• “DB2UDB”</li> <li>• “ORACLE”</li> <li>• “MSSQL”</li> </ul>
<b>dedupIndexSpace</b>	<p>The value depends upon the RDBMS. Set to:</p> <ul style="list-style-type: none"> <li>• MSSQL: “[DEFAULT]”</li> <li>• ORACLE: “RYWORK”</li> <li>• DB2UDB: “RYWORKIDX”</li> </ul>
<b>DedupTableSpace</b>	<p>The value depends upon the RDBMS. Set to:</p> <ul style="list-style-type: none"> <li>• MSSQL: “[DEFAULT]”</li> <li>• ORACLE: “RYWORK”</li> <li>• DB2UDB: “RYWORK”</li> </ul>
<b>ConnectId</b>	The database user name.
<b>ConnectPswd</b>	The database user’s password (PSCipher encrypted).
<b>jdbcDriver</b>	<p>The class name of the JDBC driver used. It should be one of the following:</p> <ul style="list-style-type: none"> <li>• MSSQL: com.microsoft.sqlserver.jdbc.SQLServerDriver</li> <li>• ORACLE: oracle.jdbc.driver.OracleDriver</li> <li>• DB2UDB: com.ibm.db2.jcc.DB2Driver</li> </ul>
<b>dbServerURL</b>	<p>The JDBC connection URL. This URL contains information about the database server, port (when applicable), and database instance. The format of the URL is also JDBC driver dependent. The formats are as follows:</p> <ul style="list-style-type: none"> <li>• MSSQL: jdbc:sqlserver://server:port;DatabaseName=dbInstance;sql70=true;charset=Cp1252</li> <li>• ORACLE: jdbc:oracle:thin:@server:port:dbInstance</li> <li>• DB2UDB: jdbc:db2://server:port/dbInstance</li> </ul>

You can also set parameters directly in the configuration file for the specific component. Parameters saved in these locations have the following precedence:

- The highest precedence is the configuration files (DES.config, MCR.config, ERP.config, and WDG.config). Values set in the configuration files are always used by PeopleSoft Enterprise Online Marketing.
- The lowest precedence is the values set in the Settings page. These values will be overridden by any values that are set in the other locations.


The advantage of using the Dialog Execution Server Settings page is that the settings are used globally, which provides for easier system maintenance. Use of configuration files should be limited to the database connection values.

## Task 3-2: Setting Up the FTP Server URL for File Upload

The File Upload feature of Online Marketing requires an FTP server. The URL for the FTP server must be specified in the CRM system.

To specify the FTP URL:

1. Select PeopleTools, Utilities, Administration, URLs.
2. Search for the URL *RY\_ATTACHMENTS* and open it.



The screenshot shows the 'URL Maintenance' page in a web browser. The page has a light blue header with the title 'URL Maintenance'. Below the header, there are four labeled fields: 'URL Identifier' with the value 'RY\_ATTACHMENTS', '\*Description' with the value 'Attachment ftp server', '\*URL' with the value 'ftp://[user ID:password@]<host name>[:port]/[path name/]', and 'Comments' with the value 'Uploaded files will be put in the above location'. The 'Comments' field is a text area with a vertical scrollbar on the right side.

URL Maintenance page

The *RY\_ATTACHMENTS* URL should contain the value of a valid FTP server location to be used by OLM during the file upload procedure. If this URL is no longer valid or the location of the FTP server has changed, this URL must be updated accordingly.

## Task 3-3: Setting Up to Bypass SignOn

To access the PeopleSoft CRM Self-Service component from the Dialog Login page directly, the PIA web profile must be set to log on by default. That is, the PIA signon page must be bypassed.

To set up the web profile:

1. Decide which PIA server needs to bypass the signon page.
2. Open the file *configuration.properties* and note the value of the parameter WebProfile (for example, *DEV*).

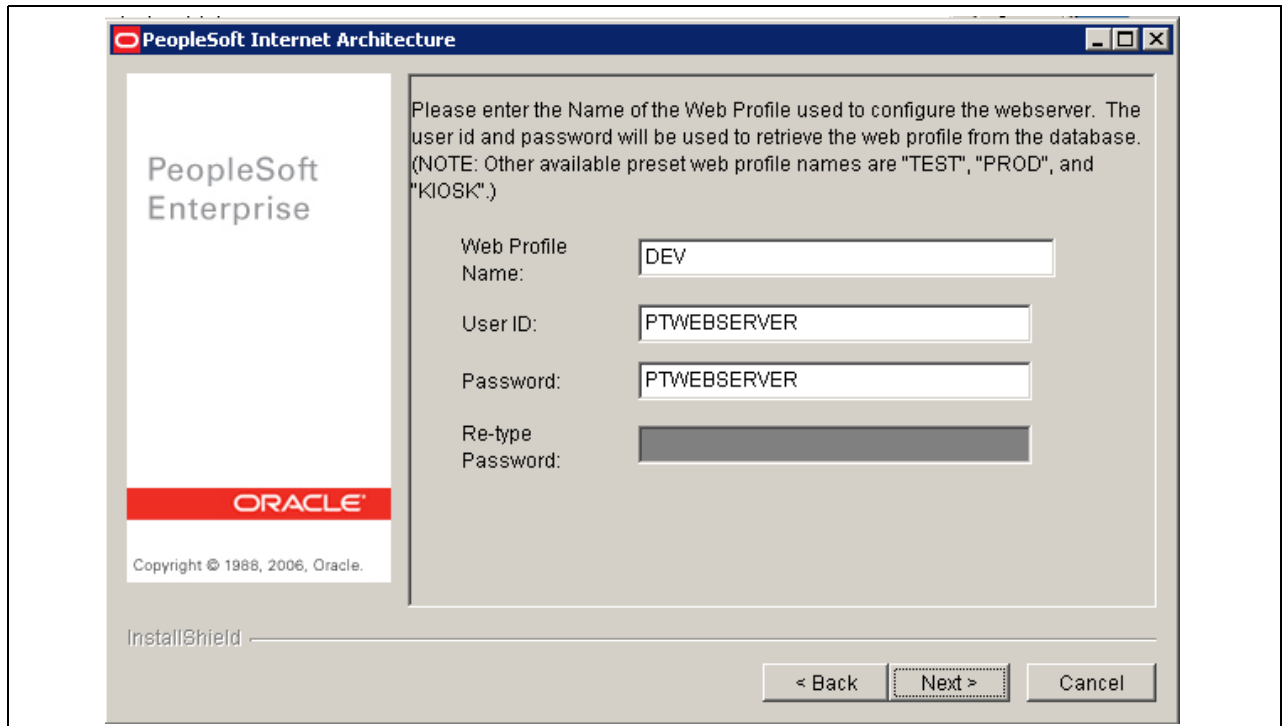
**Note.** The default location for *configuration.properties* file is as follows:

For PIA on WebLogic and WebSphere: <%PS\_HOME%>\websevr\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps

For PIA on OAS: <%OAS\_HOME%>\j2ee\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps

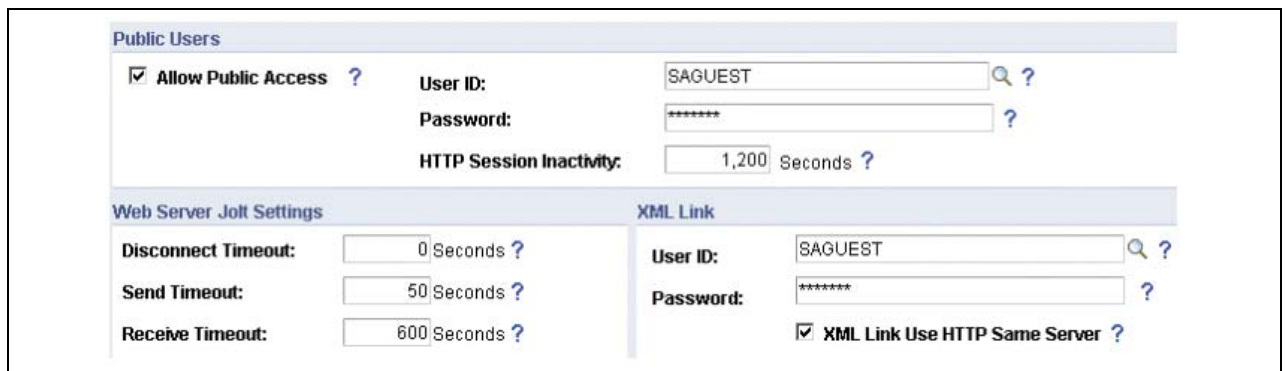
This value was specified as the Web Profile Name during the PIA installation:





PeopleSoft Internet Architecture Web Profile dialog box

3. Select PeopleTools, Web Profile, Web Profile Configuration.
4. Search for and open the web profile that is defined in the configuration.properties file (for example, *DEV*).
5. Select the Security tab.
6. In the “Public Users” section, select the Allow Public Access check box and set the User ID and Password fields to *SAGUEST*.



Web Profile page

7. Click Save.
8. Restart the PIA server.

## Task 3-4: Assigning Self-Service Permissions to OLM Users

This section discusses:

- Understanding Self-Service Permissions
- Registering the OLM User in Self-Service
- Assigning Self-Service Roles to an OLM User

## Understanding Self-Service Permissions

The OCSS permission must be assigned to the Online Marketing user. Users SAGUEST and OLM are shipped with all appropriate self-service settings.

---

**Note.** For Users SAGUEST and OLM, please skip this task.

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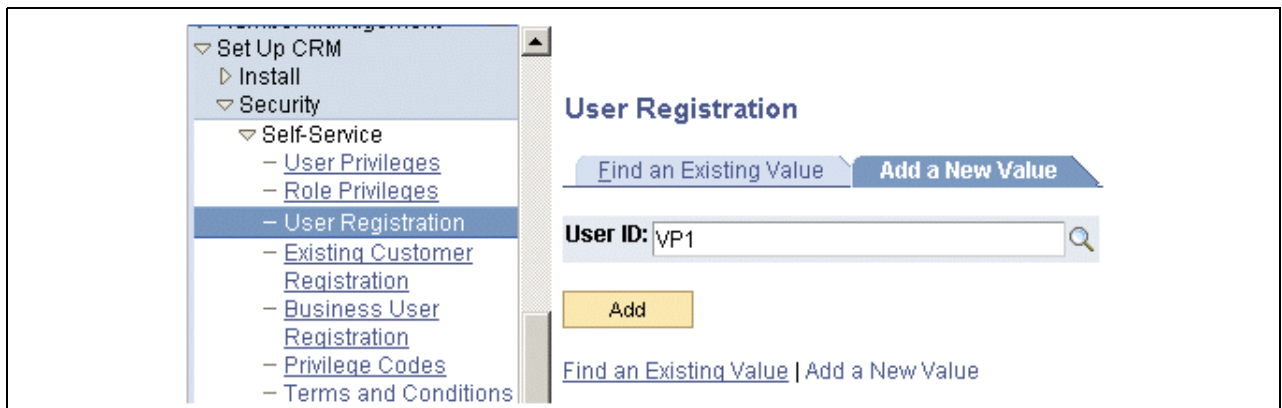
You must use the procedures in this section to add a new OLM user as a self-service user if:

- The user needs to execute a dialog that includes creating a self-service user via the Dialog Link Report (this occurrence is not common).
- The user is a Self-Service dummy GUEST user (for example, SAGUEST) that needs to be able to register new users from the Dialog Login page.

### Task 3-4-1: Registering the OLM User in Self-Service

To register an OLM user in Self-Service:

1. Select Set Up CRM, Security, Self-Service, User Registration.
2. Add a new value and enter the user ID (for example, VP1).
3. Click Add.



User Registration page - Add a New Value tab

4. Complete the page with the information circled here:

**User Registration Setup**

User ID VP1

Confirm Guest Password

\*Password \*\*\*

Password Security Policy

☒ Password Never Expires  
☐ Password Expires inDays 0

Copy Default Consumer Options

Consumer Name SHAREConsumer Template

Permission Lists

\*Process Profile ALLPAGES  
\*Primary ALLPAGES

Customer Registration Fields

Template Email and Name Template

Terms and Conditions

Terms and Conditions SetID

Transfer To

☒ Catalog  
☐ Customer Care

Grant Consumer Role(s)

*Role Name	Description		
Consumer	Consumer	+	-
EOPP_USER	Common Portal User	+	-
PAPP_USER	Enterprise Portal User	+	-

Grant Business User Role(s)

*Role Name	Description		
Consumer	Customer	+	-
EOPP_USER	Common Portal User	+	-
PAPP_USER	Enterprise Portal User	+	-

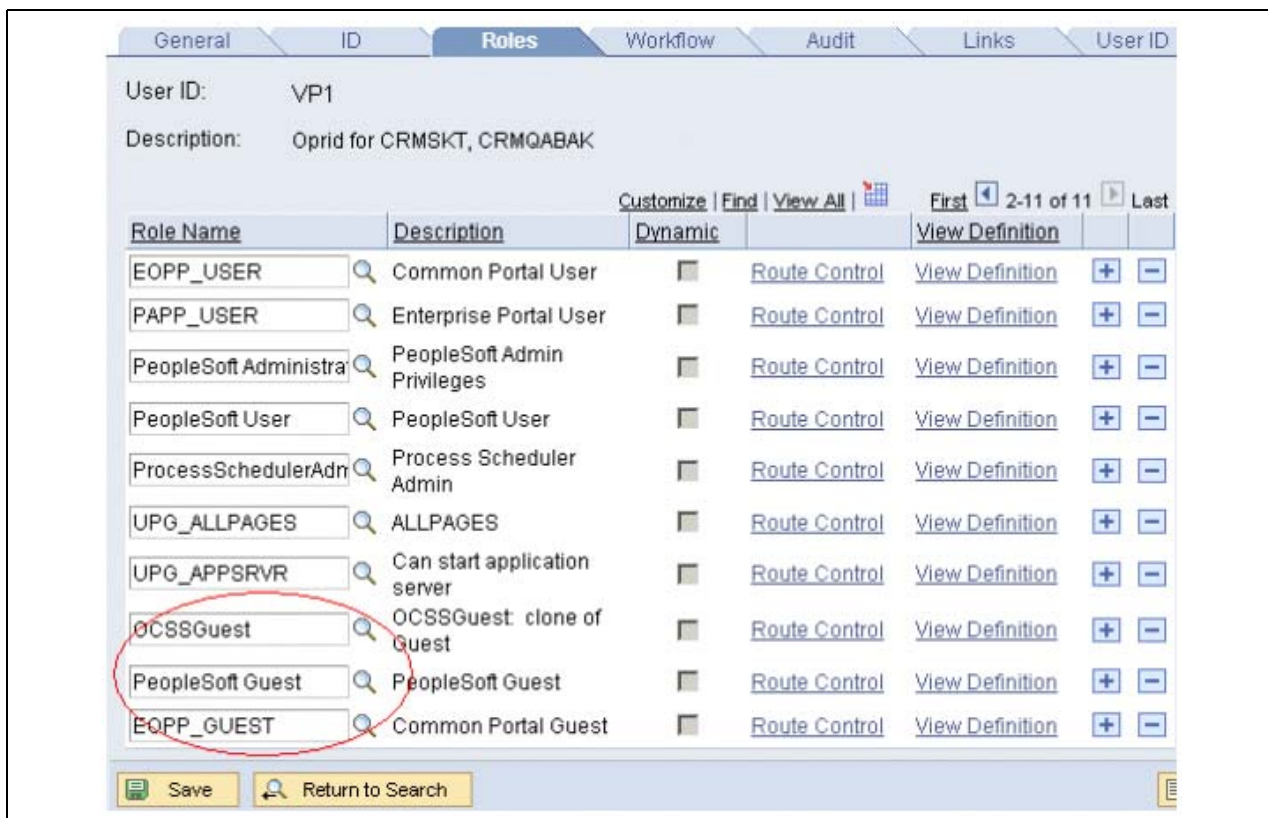
User Registration Setup page

5. Click Save.

## Task 3-4-2: Assigning Self-Service Roles to an OLM User

To assign self-service roles to an OLM user:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. Search for the appropriate User ID (for example, VP1) and select the Roles tab.
3. Make sure the three roles circled below are added to the list:



Roles page

4. Click Save.
5. Click OK if you receive the following message:

Warning -- PERSON\_ID = '<a ID>' assigned to another User ID.

6. Select the ID tab and select Person from the ID Type drop-down list box. Enter a Person ID in the Attribute Value field and note the Person ID or Person's Name (in the following example, 100946 or Template, SHAREConsumer). This person is defined in the demo database with both business contact and consumer roles.

---

**Note.** If you are working on the system database, you have to create a Person first, and the Person should have both business contact and consumer roles.

---

The screenshot shows the 'ID' tab in the PeopleSoft interface. At the top, there are tabs for General, ID, Roles, Workflow, Audit, Links, and User ID Queries. The 'ID' tab is selected. Below the tabs, the 'User ID' is 'VP1' and the 'Description' is 'Oprid for CRMSKT, CRMQABAK'. The 'ID Types and Values' section shows a dropdown for 'ID Type' set to 'Person'. Below this is a table with columns 'Attribute Name', 'Attribute Value', and 'Description'. The table contains one row: 'Person ID' with value '100946' and description 'Template,SHAREConsumer'. The 'User Description' section has a 'Description' field with the same text 'Oprid for CRMSKT, CRMQABAK' and a link 'Set Description' with the instruction 'or type in User Description.'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Add', and 'Update/Display'.

Example of an ID page

7. Save.

See “PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook”

## Task 3-5: Setting Up OLM Internal EIPs

This section discusses:

- Understanding OLM Messages
- Loading Gateway Connectors
- Setting Up the URL for the PSFT\_OLM Node

### Understanding OLM Messages

PeopleSoft Enterprise Online Marketing uses XML messages sent directly to the Integration Broker via JOLT. Also, messages are used to update the Online Marketing Activation Framework whenever a profile status is modified.

### Task 3-5-1: Loading Gateway Connectors

.

To load Gateway connectors:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click Search.
3. Enter this URL (replace the `<webserver>:<port>` with the PIA server name and port):

```
http://<webserver>:<port>/PSIGW/PeopleSoftListeningConnector
```

4. Click the Load Gateway Connectors button.

5. Click Save.

## Task 3-5-2: Setting Up the URL for the PSFT\_OLM Node

To set up DES server URL to the Integration Broker node - PSFT\_OLM:

---

**Note.** If you do not set up the Gateway, the connector HTTPTARGET will not be available.

---

1. Select PeopleTools, Integration Broker, Integration Setup, Node Definitions.
2. Search and open the node PSFT\_OLM.
3. Select the Connectors tab and modify the PRIMARYURL property as follows:
  - Replace `<webserver>:<port>` with the DES server name and port: `http://<webserver>:<port>/DCS/DlgBroker`.
  - Click Save.

---

## Task 3-6: Installing the Dialog Execution Server on OAS

This section discusses:

- Installing the Dialog Execution Server on OAS on Microsoft Windows
- Installing the Dialog Execution Server on OAS on UNIX
- Start the Dialog Execution Server on OAS

---

**Note.** You cannot use an existing PIA application on OAS for the Dialog Execution Server.

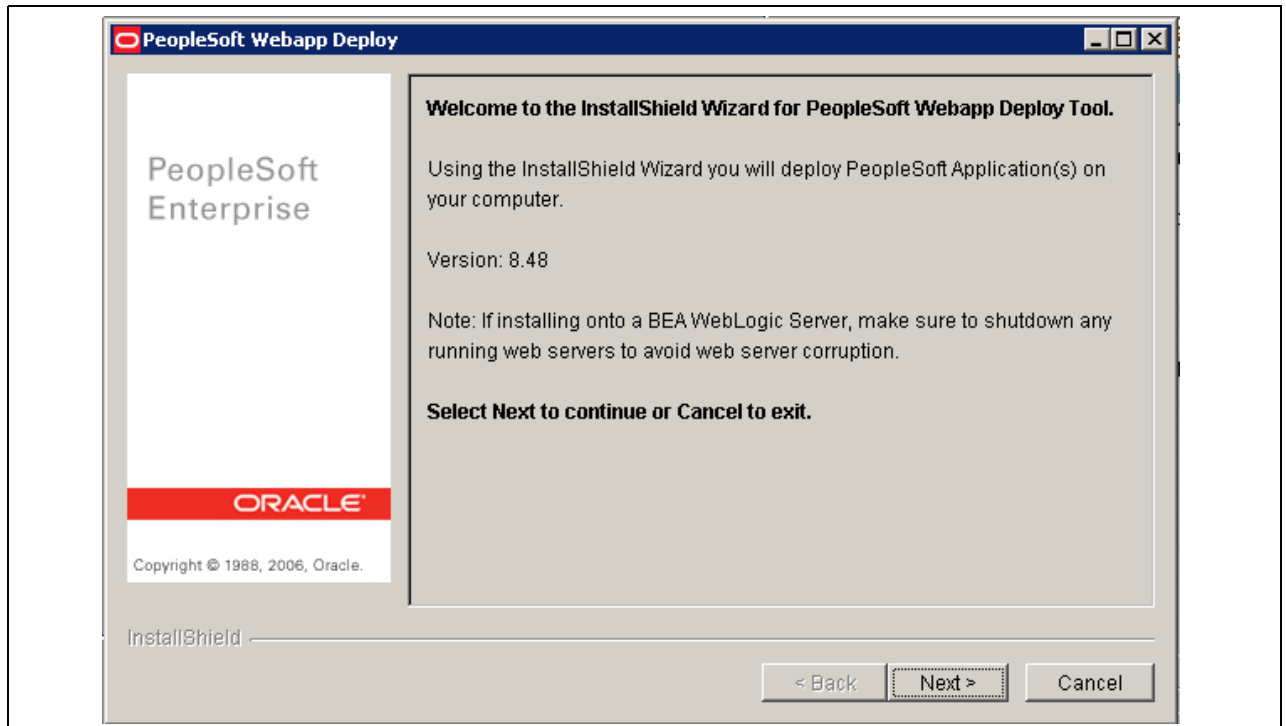
You cannot use the same PIA HTTP/HTTPS port number for the Dialog Execution Server HTTP/HTTPS port number.

---

### Task 3-6-1: Installing the Dialog Execution Server on OAS on Microsoft Windows

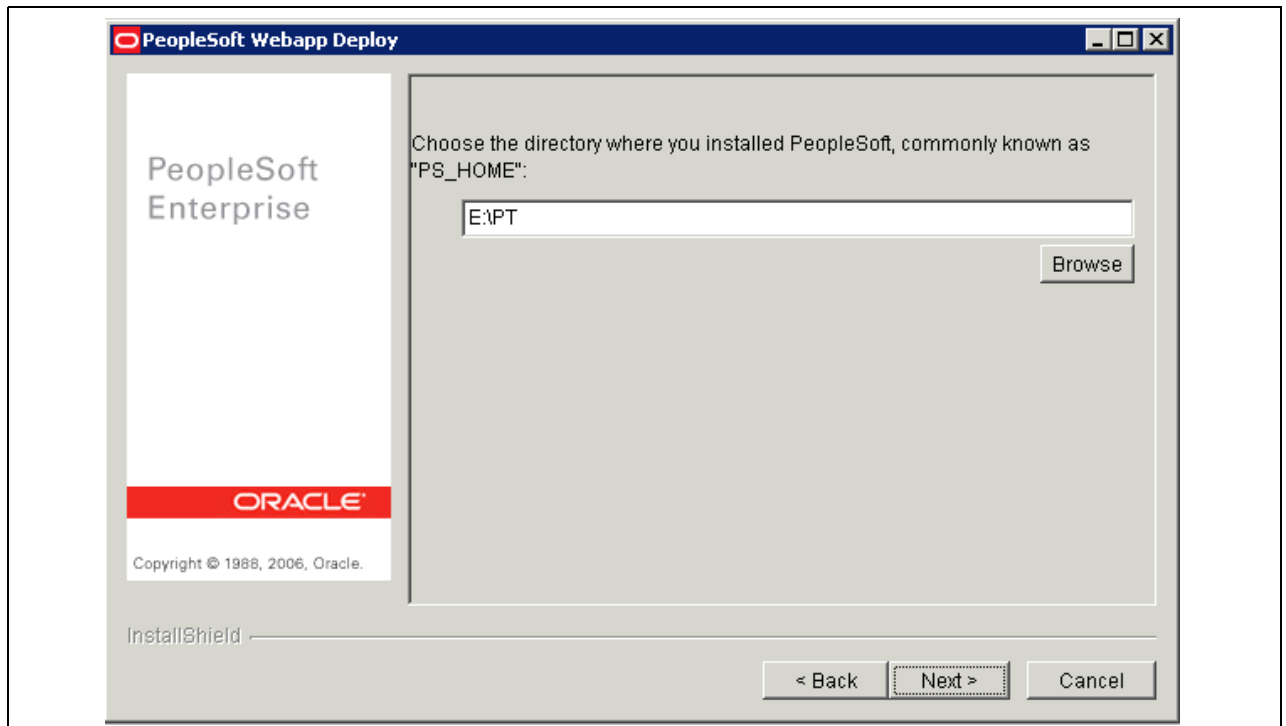
To install the Dialog Execution Server on OAS on Microsoft Windows:

1. Go to `<PS_HOME>\setup\mpwebappdeploy` and run `setup.exe`.
2. Click Next on the Welcome page:



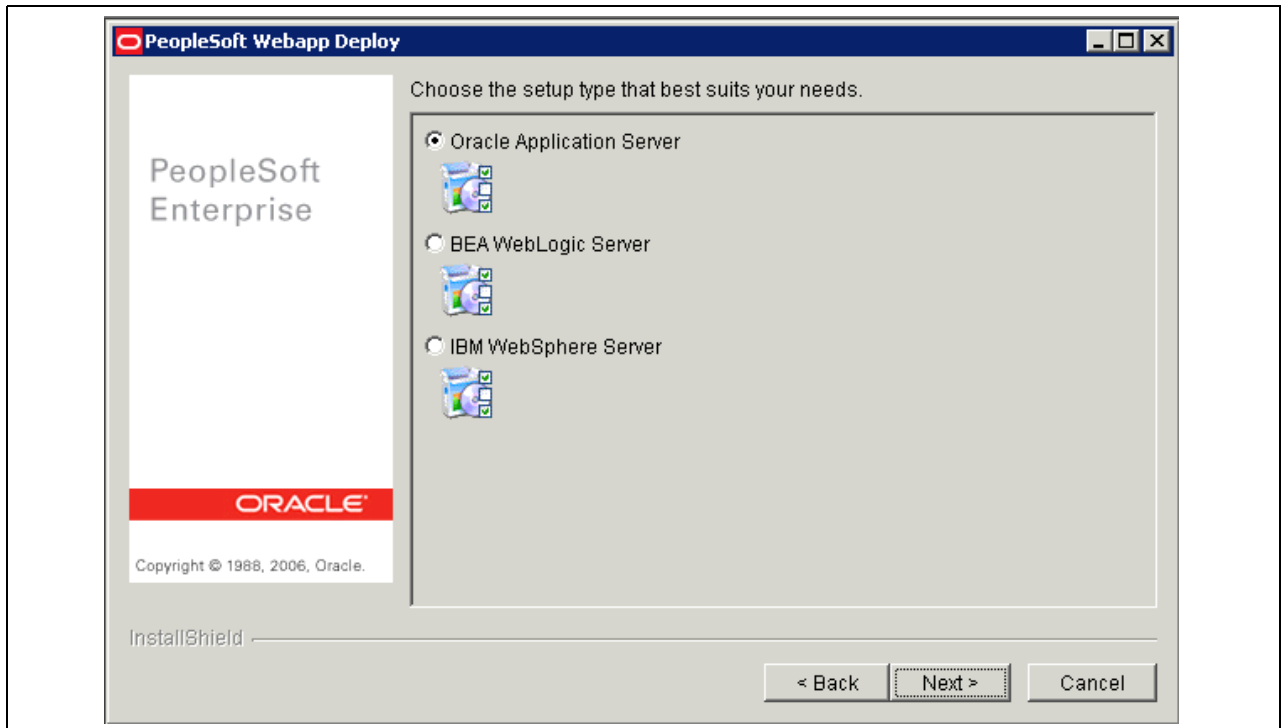
Webapp Deploy window - Welcome

3. Enter the <PS\_HOME> directory and click Next:



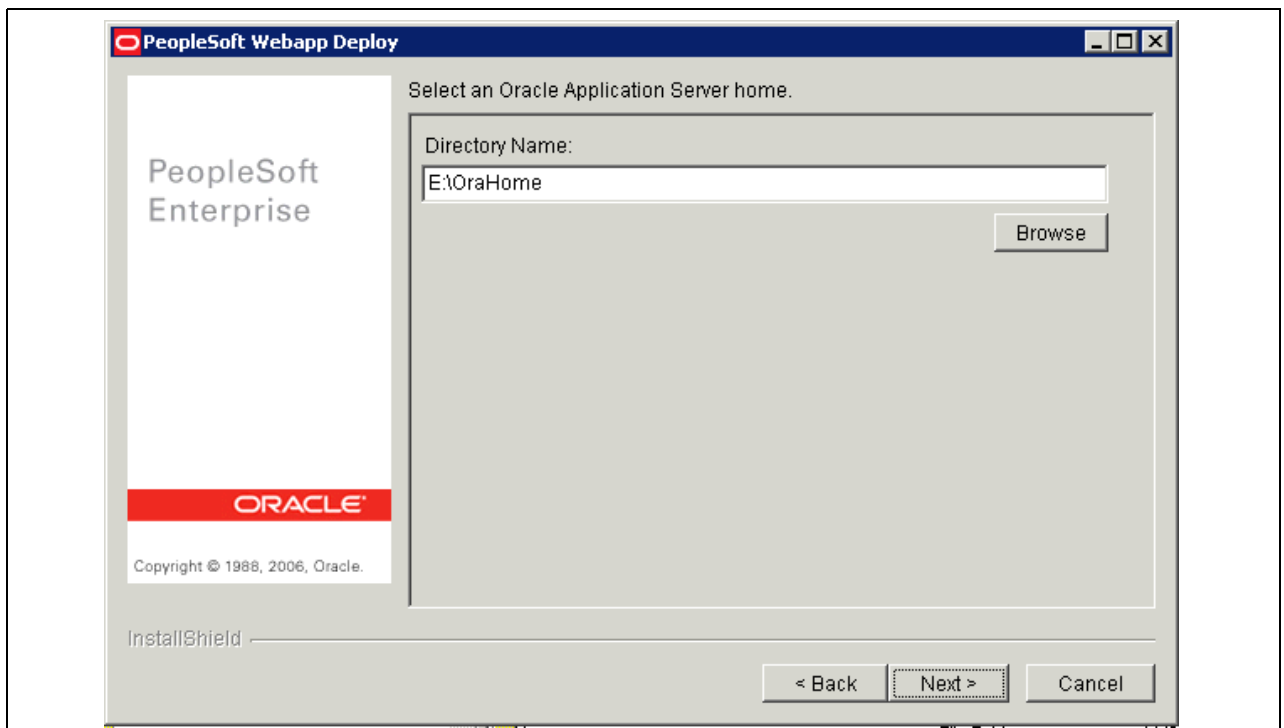
Webapp Deploy window - PeopleTools home directory selection

4. Select Oracle Application Server and click Next:



Webapp Deploy window - Web server selection

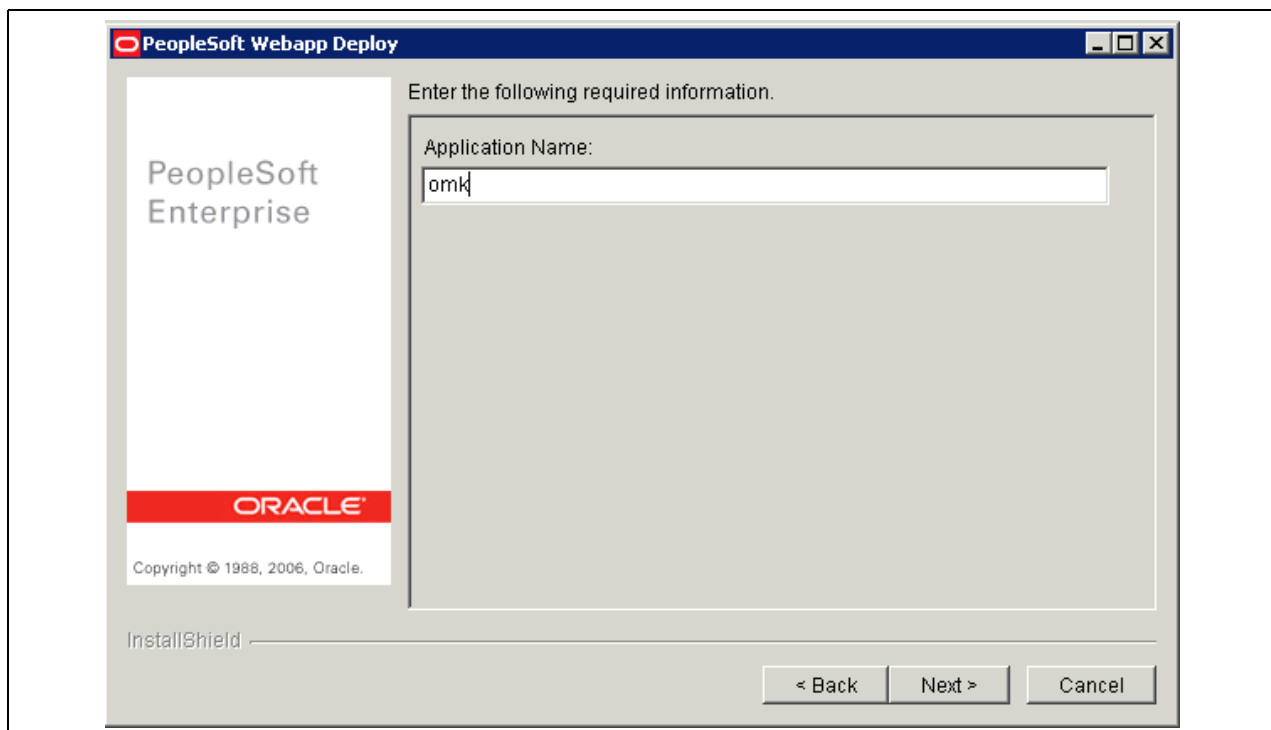
5. Enter Oracle application server home directory (for example, *c:\OraHome*) and click Next:



Webapp Deploy window - Oracle Application Server home directory selection

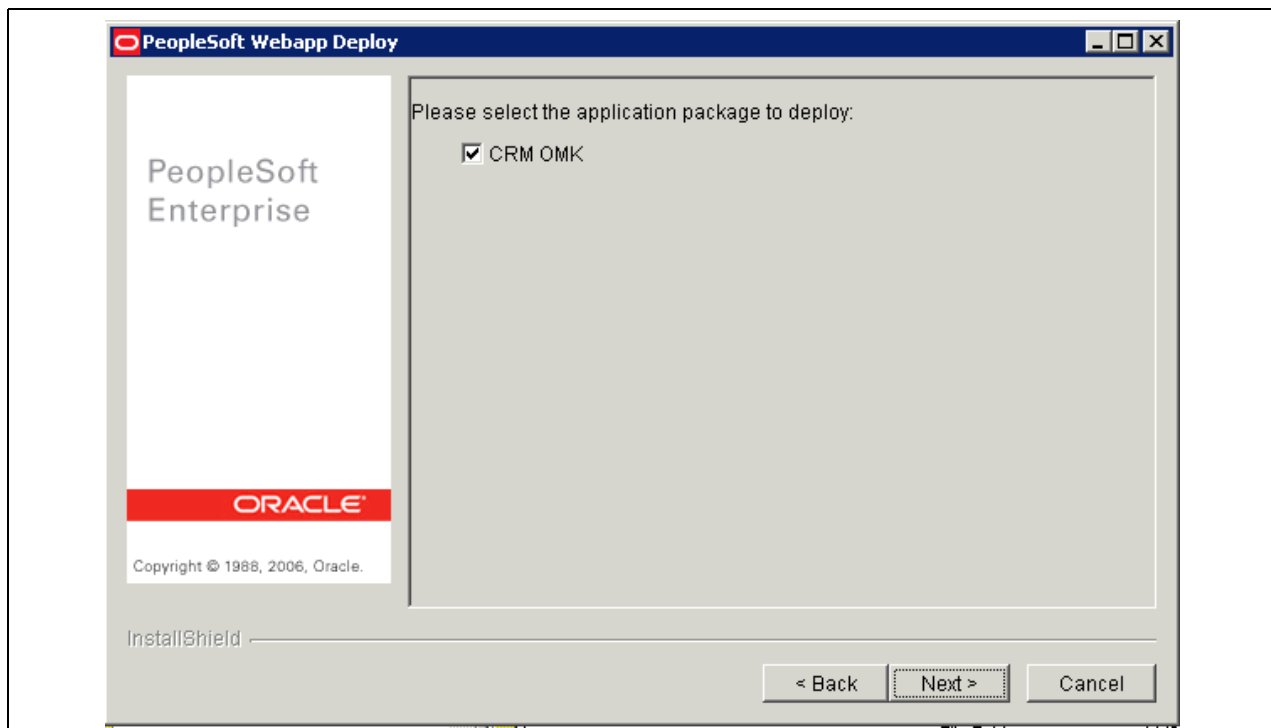
6. Enter your new application name (for example, *omk*) and click Next. Do not use the same names you used for the PeopleSoft web server application:





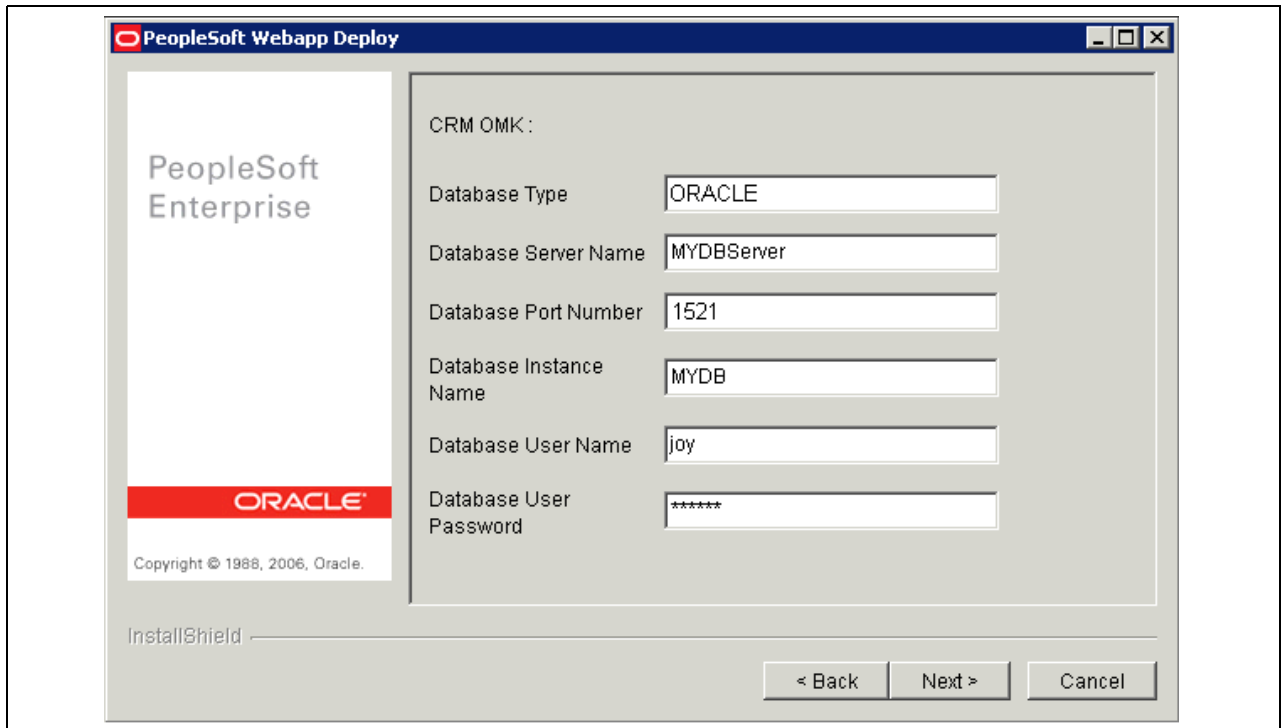
Webapp Deploy window - Application name selection

7. Select *CRM OMK* as the application package to deploy and click Next:



Webapp Deploy window - Application package selection

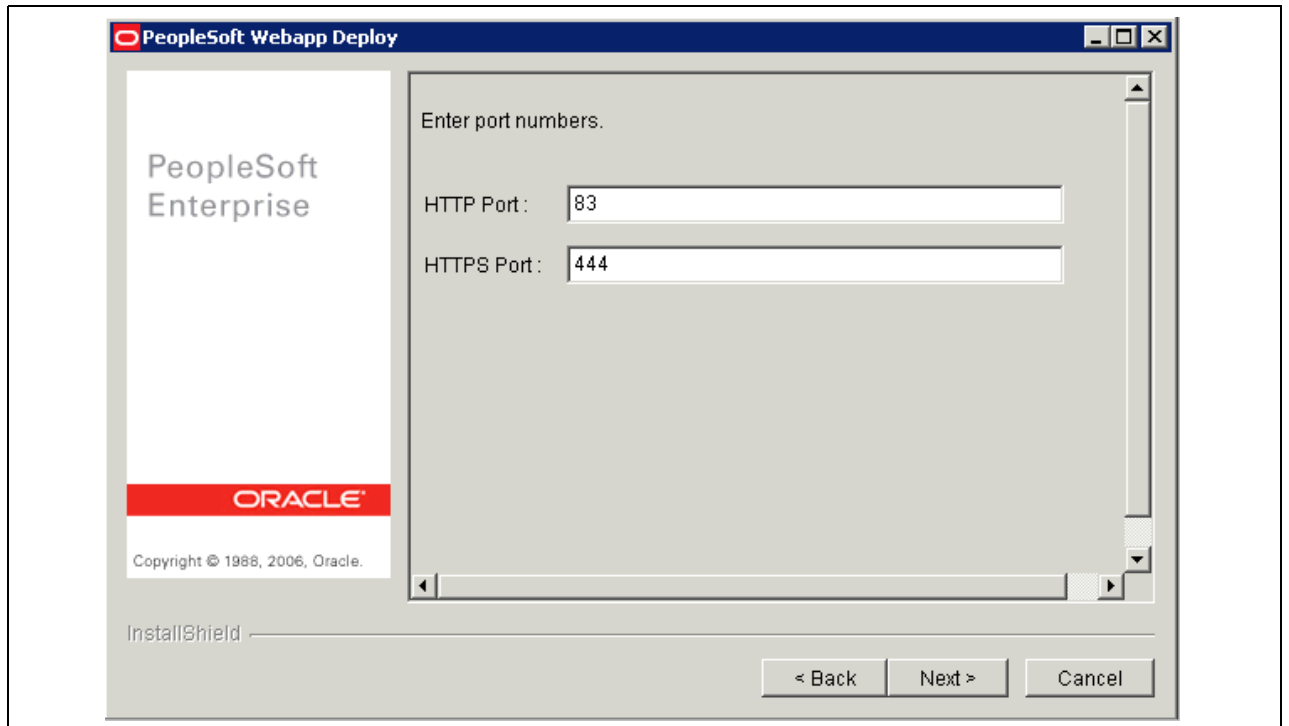
8. Enter the following CRM database information and click Next:



Webapp Deploy - CRM database information

- |                               |  |
|-------------------------------|--|
| <b>Database Type</b>          | Enter <i>ORACLE</i> , <i>MSSQL</i> , or <i>DB2UDB</i> .                |
| <b>Database Server Name</b>   | Identifies the machine hosting the database.                           |
| <b>Database Port Number</b>   | Enter <i>1521</i> (not applicable for <i>MSSQL</i> ; enter <i>0</i> ). |
| <b>Database Instance Name</b> | Identifies the database name.  |
| <b>Database User Name</b>     | Identifies the database user.  |
| <b>Database User Password</b> | Identifies the password for the database user.                         |

9. Enter DES HTTP and HTTPS port numbers and click Next:



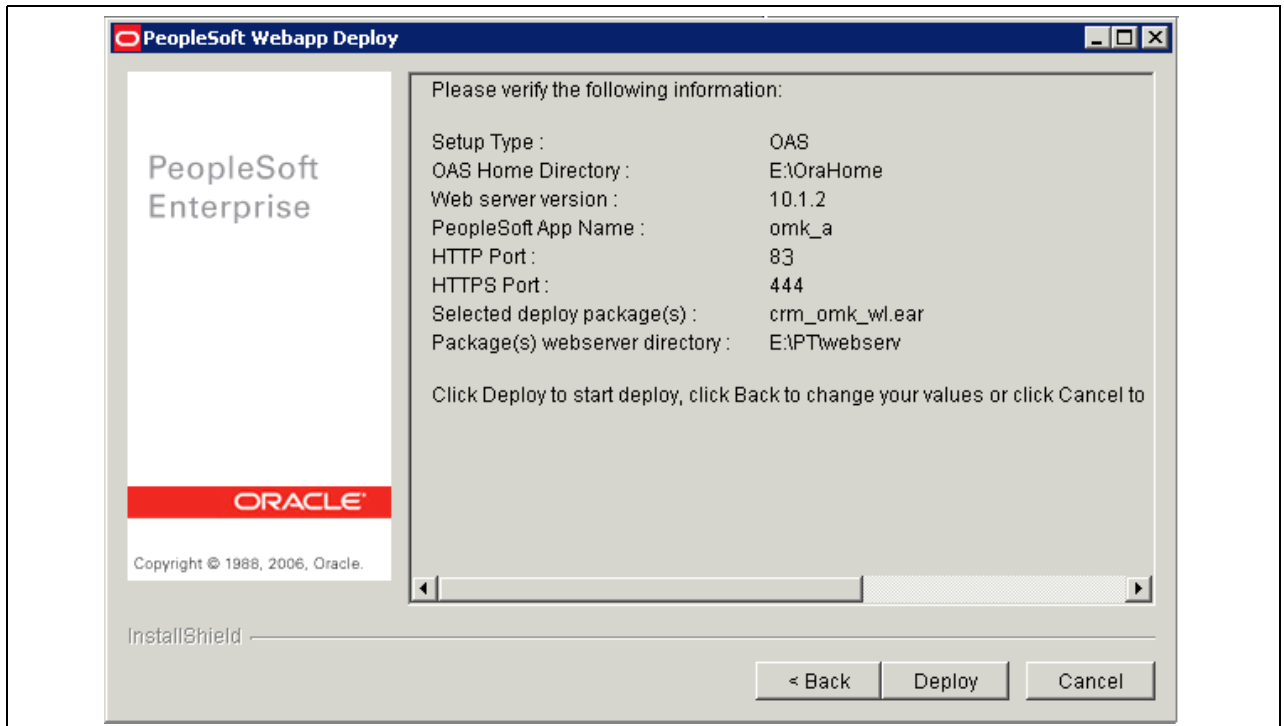
Webapp Deploy window - DES HTTP/HTTPS port selection

10. Verify that the information is correct. If it is not, click Back and correct the issue. When ready, click Deploy to start the installation:

---

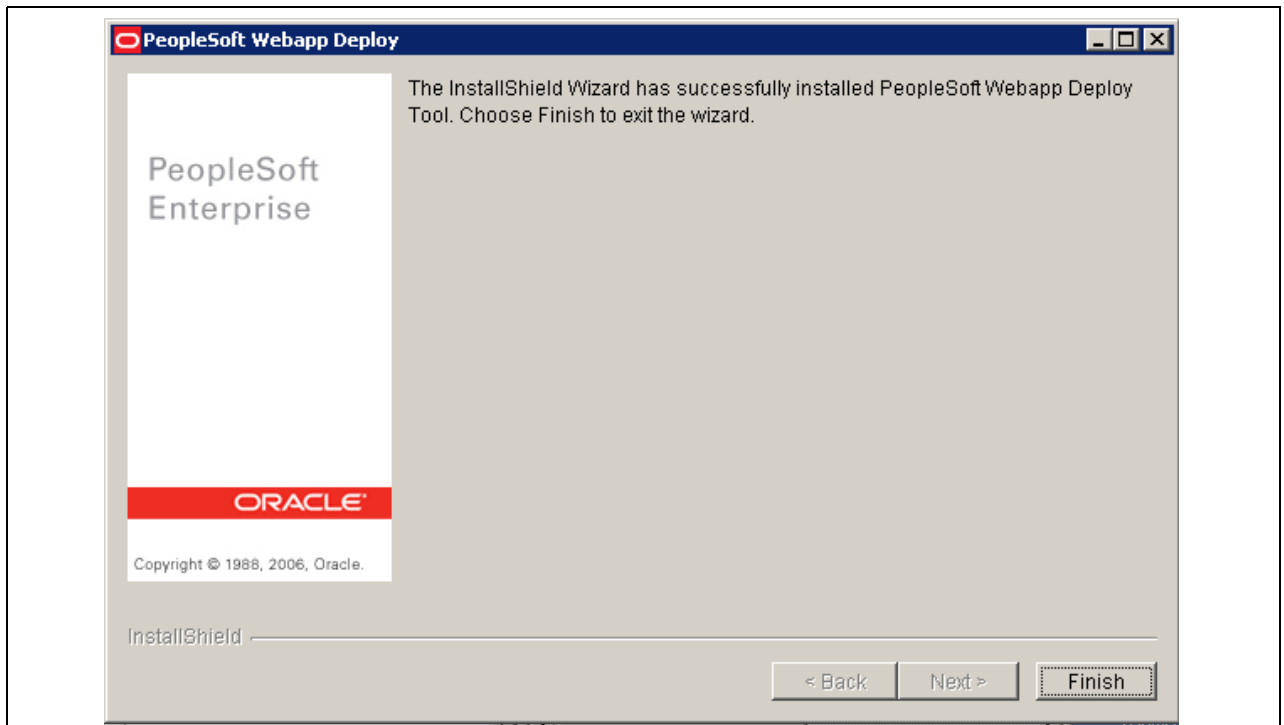
**Note.** This process may take up to five minutes. If it does not finish in five minutes, check the DES0\_stderr.log log file in the DES installation directory for errors or information (for example, <OraHome>\j2ee\omk\applications\omk\DES\DES0.stderr.log).

---



Webapp Deploy window - Summary

11. Click Finish to exit the installation:



Webapp Deploy window - Final

## Task 3-6-2: Installing the Dialog Execution Server on OAS on UNIX

To install the Dialog Execution Server on OAS on UNIX:

1. Go to <PS\_HOME>/setup/mpwebappdeploy and run the appropriate setup command with additional parameters as follows:
  - a. \$setup.aix -is:javaconsole -console
  - b. setup.solaris -is:javaconsole -console
2. Make appropriate selections for the following:  
 Select Next to continue or Cancel to exit  
 Press 1 for Next, 3 to Cancel, or 4 to Redisplay [1]

Choose the directory where you installed PeopleSoft, commonly known as "PS\_HOME":

Please specify a directory name or press Enter [/ds1/pshome/]

Press 1 for Next, 2 for Previous, 3 to Cancel or 4 to Redisplay [1]

Choose the setup type that best suits your needs.

- [X] 1 - Oracle Application Server
- [ ] 2 - BEA WebLogic Server
- [ ] 3 - IBM WebSphere Server

To select an item enter its number, or 0 when you are finished: [0]

Press 1 for Next, 2 for Previous, 3 to Cancel or 4 to Redisplay [1]

Select an Oracle Application Server home.

Directory Name: [/opt/OraHome\_1]/ds1/Orahome

Checking OAS version, please wait ...

Enter the following required information.

Application Name: [PSWebApp]omk

Press 1 for Next, 2 for Previous, 3 to Cancel or 4 to Redisplay [1]

Please select the application package to deploy:

- [X] 1 - CRM OMK

To select an item enter its number, or 0 when you are finished [0]:

Press 1 for Next, 2 for Previous, 3 to Cancel or 4 to Redisplay [1]

CRM OMK :

Database Type

- [MSSQL]MSSQL(or ORACLE, DB2UDB)

Database Server Name

[ ] **dbServername**

Database Port Number

[ 0 ] **dbport (or 0 for MSSQL)**

Database Instance Name

[ ] **dbName**

Database User Name

[ Admin ] **userId**

Database User Password

[ ] **dbpassword**

Press 1 for Next, 2 for Previous, 3 to Cancel or 4 to Redisplay [1]

Enter the HTTP and HTTPS port numbers for the DES server:

---

**Note. Important!** These HTTP port numbers must be different than your PIA port number.

---

HTTP Port: [ 80 ] **82**

HTTPS Port: [ 443 ] **444**

Please verify the following information:

Setup Type :OAS

OAS Home Directory :/ds1/Orahome

Web server version :10.1.2

PeopleSoft App Name :omk

HTTP Port: 82

HTTPS Port: 444

Selected deploy package(s) :crm\_omk\_wl.ear

*Select 1 to deploy, select 2 to change your values or select 3 to exit.*

*Press 1 for Next, 2 for Previous, 3 to Cancel or 4 to Redisplay [1]*

Deploying PeopleSoft Application : CRM OMK ...

0 % complete

20 % complete

sReqFileName= required.jar

Buildfile: /var/tmp/deployOAS.xml

oracle-env-check:

ps-env-check:

webappdeploy-component-name-check:

webappdeploy-env-check:

webappdeploy-component-properties:

```

[echo] -----> PeopleTools Home           : /ds1/pshome
[echo] -----> Oracle Home                 : /ds1/Orahome
[echo] -----> WebAppDeploy Component Name : omk
webappdeploy-component-deploy:
[echo] -----> Starting WebAppDeploy Component Deployment
[echo] -----> Restarting OAS Component
[echo]           Executing: opmnctl restartproc ias-component=dcm-daemon
[echo] -----> Creating OC4J Component omk
[echo]           Executing: dcmctl createComponent -ct oc4j -co omk
[echo] -----> Deploying /ds1/pshome/setup/mpwebappdeploy/archives/crm_omk_⇒
wl.ear
[echo] -----> Deploying omk to OC4J Component omk
[echo]           Executing: dcmctl deployApplication -f /ds1/pshome/setup⇒
/mpwebappdeploy/archives/crm_omk_wl.ear -co omk -a omk
[unjar] Expanding: /ds1/pshome/setup/mpwebappdeploy/archives/required.jar⇒
into /ds1/Orahome/j2ee/omk/applications/omk
[echo] -----> Starting OC4J Component omk
[echo]           Executing: opmnctl startproc ias-component=OC4J process-type=⇒
omk
[echo] -----> Restarting OAS Component
[echo]           Executing: opmnctl restartproc ias-component=HTTP_Server
[echo] -----> Cleaning up in single component deployment cleanUpUnix-⇒
single:
...
Total time: 1 minute 4 seconds
100 % complete
Deploy Completed. Click next to finish the install.
The InstallShield Wizard has successfully installed PeopleSoft Webapp Deploy
Tool. Choose Finish to exit the wizard.

```

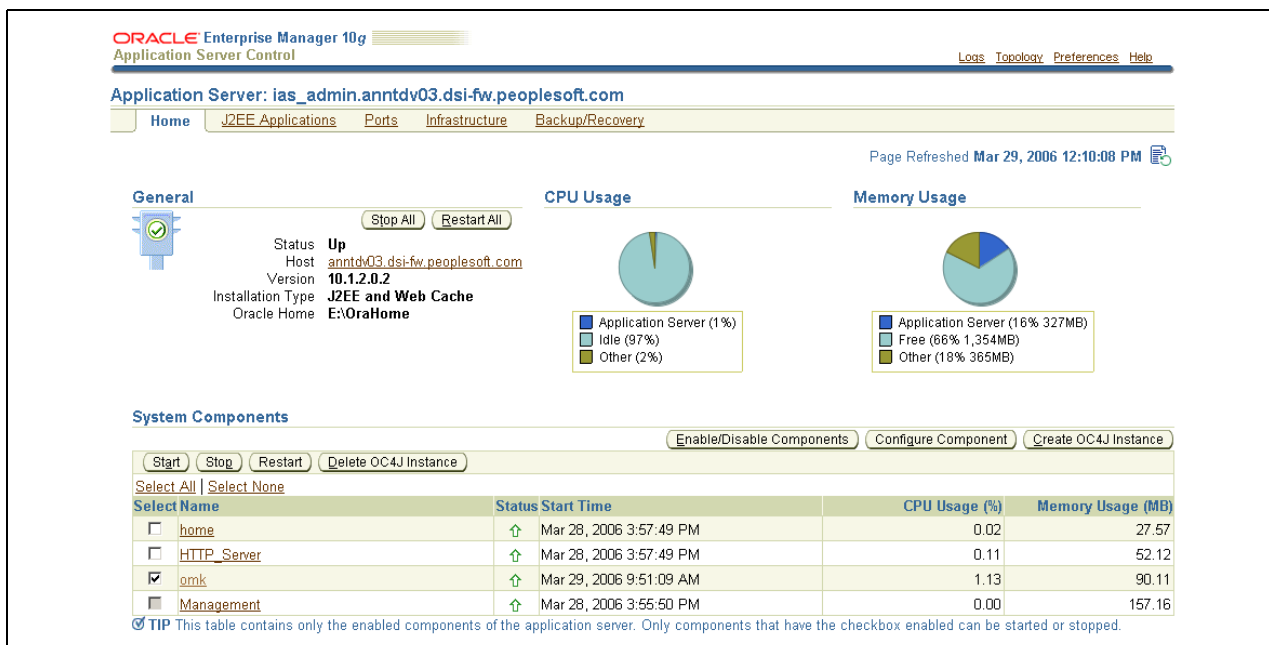
*Press 3 to Finish or 4 to Redisplay [3]3*

## Task 3-6-3: Start the Dialog Execution Server on OAS

After DES is installed, the installation program will start it automatically. However, because a manual installation of the JDBC driver is necessary for DES to function properly, you will need to restart the DES after the driver installation.

To start DES on OAS, you can do one of two things:

1. Restart all applications on OAS by running the command "%OraHome%\opmn\bin\opmnctl.exe startall" in a command window.
2. Start the DES application directly by selecting the Home tab in the OAS Administration Console, selecting the application name (for example, *omk*) and clicking the Start button:



<page name> page

## Task 3-7: Installing the Dialog Execution Server on WebSphere

This section discusses:

- Creating a New WebSphere Server
- Creating and Removing Services for a Microsoft Windows Installation
- Installing the Dialog Execution Server on WebSphere on Microsoft Windows
- Installing the Dialog Execution Server on WebSphere on UNIX
- Starting the Dialog Execution Server on WebSphere

**Note.** You cannot use an existing PIA server on WebSphere for the Dialog Execution server. You cannot use the same PIA HTTP/HTTPS port number for the Dialog Execution Server HTTP/HTTPS port number. You must create a new WebSphere web server and start this server before installing the DES server. Creating and starting the new WebSphere web server should be done through the WebSphere administrative console.

### Task 3-7-1: Creating a New WebSphere Server

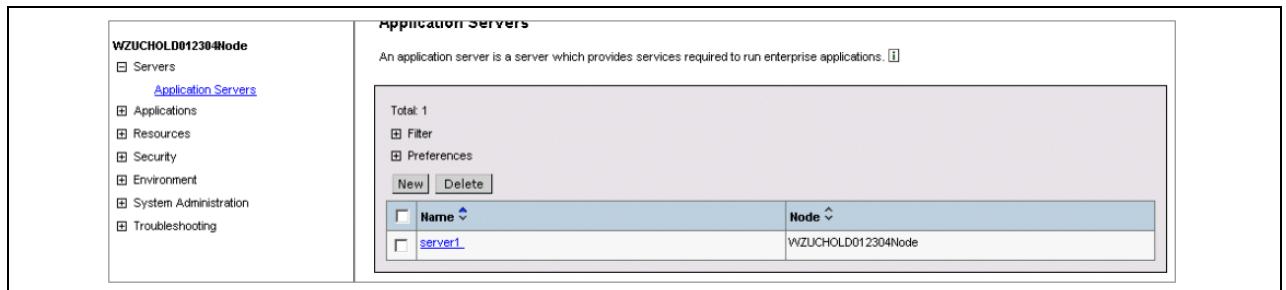
To create a new WebSphere server:

1. Start the WebSphere server1 if it is not already started.
2. Open the WebSphere Administration Console where the WebSphere base is centrally administered:

**Note.** To exit the console, click the exit tab at the top of the console window.

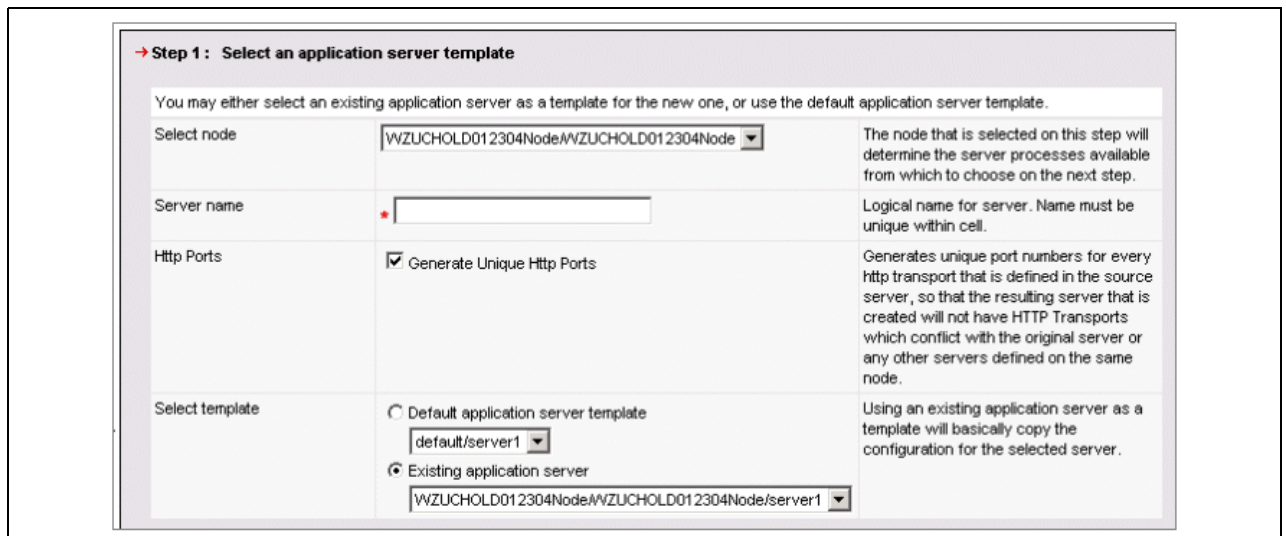


- Enter `http://localhost:9090/admin` in a browser (where 9090 is the default administration port).
  - 9090 is the default administration client port without co-existence. In the case of co-existence, another port is selected and will appear here.
  - If WebSphere is installed silently or with modified ports, the First Steps link to the Administrative Console will not work. The Administrative Console can be accessed through the Admin Console port specified as a modified port or through the silent install ports 19090 or 19091.
  - On AIX systems, the AIX Web-Based System Manager (WSM) may be running on port 9090. The WSM will prevent the WebSphere Administration Console from running on port 9090. Change the WebSphere Administration Console port to prevent this conflict.
3. Enter the user ID and click OK. By default, the console has no security, so click OK to log in.
  4. Select Applications Servers and click New:



Application Servers page

5. Define a new server name (for example, omk).
6. Select an existing application server for the template. Use server1, created earlier, as the default:



Application Server Template window

7. Click Next.
8. Click Finish.
9. Click Save.
10. Expand the Servers section and click Application Servers to validate that the second server was created:

**Application Servers**

An application server is a server which provides services required to run enterprise applications. [i]

Total: 2

☐ Filter

☐ Preferences

<input type="checkbox"/> Name	Node
<input type="checkbox"/> omk	WZUCHOLD012304Node
<input type="checkbox"/> server1	WZUCHOLD012304Node

Application Servers page

11. Select New Server and Web Container to verify the ports that were assigned to the new server:

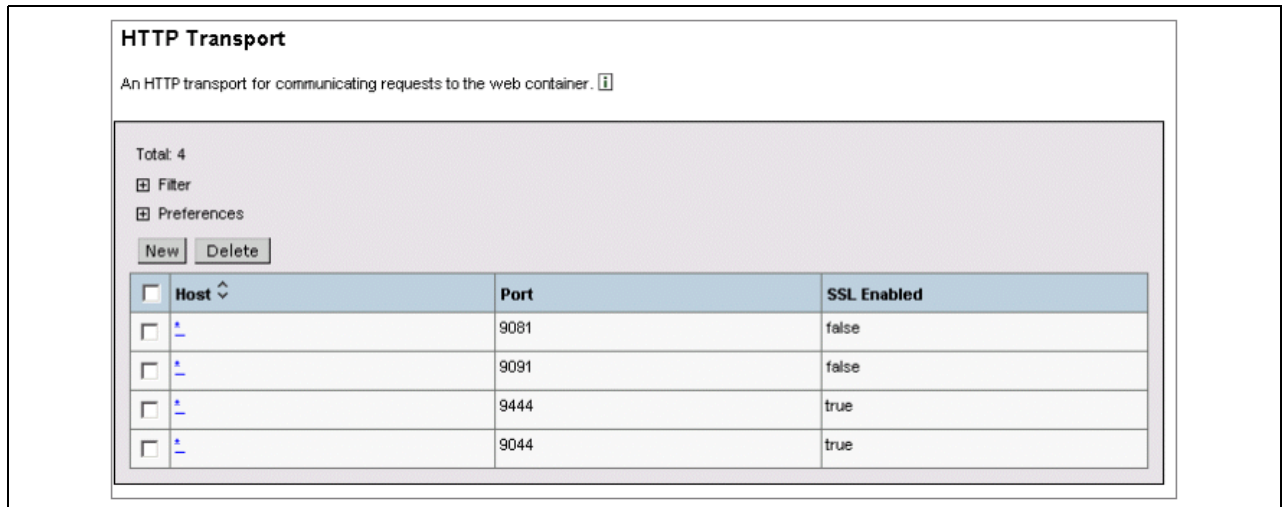
Additional Properties	
<a href="#">Transaction Service</a>	Specify settings for the Transaction Service, as well as manage active transaction locks.
<a href="#">Web Container</a>	Specify thread pool and dynamic cache settings for the container . Also, specify session manager settings such as persistence and tuning parameters, and HTTP transport settings.
<a href="#">EJB Container</a>	Specify cache and datasource information for the container .
<a href="#">Dynamic Cache Service</a>	Specify settings for the Dynamic Cache service of this server .
<a href="#">Logging and Tracing</a>	Specify Logging and Trace settings for this server .
<a href="#">Message Listener Service</a>	Configuration for the Message Listener Service.This service provides the Message Driven Bean (MDB) listening process, whereby MDBs are deployed against ListenerPorts that define the JMS destination to listen upon. These Listener Ports are defined within this service along with settings for its Thread Pool.

Additional Properties page - Web Container link

12. Select HTTP Transports

Additional Properties	
<a href="#">Thread Pool</a>	The thread pool settings for the Web container
<a href="#">Session Management</a>	Configure the session manager associated with this webcontainer
<a href="#">HTTP transports</a>	Configure the HTTP transports associated with this webcontainer
<a href="#">Custom Properties</a>	Additional custom properties for this runtime component. Some components may make use of custom configuration properties which can be defined here.

Additional Properties page - HTTP Transports link



HTTP Transport page

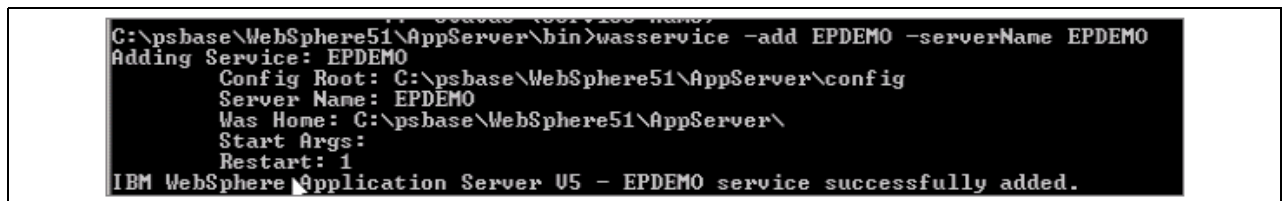
13. Start the new server by running the command "%WAS\_HOME%\bin\startServer.bat omk" in a command window.

## Task 3-7-2: Creating and Removing Services for a Microsoft Windows Installation

To create and remove services for a Microsoft Windows installation:

1. Open a command window and go to %WAS\_HOME%\bin, where WAS\_HOME is the WebSphere installation directory.
2. Run the following command:

```
wasservice -add EPDEMO -serverName EPDEMO
```



Microsoft Windows command window

3. Go to Services (on Microsoft Windows 2005, select Start, Programs, Control Panel, Administrative Tools, Services-IBM WebSphere Application Server V5 - EPDEMO) and change the login account for the service to the local account you created.
4. Start the service if it needs to be started for installing the DES.

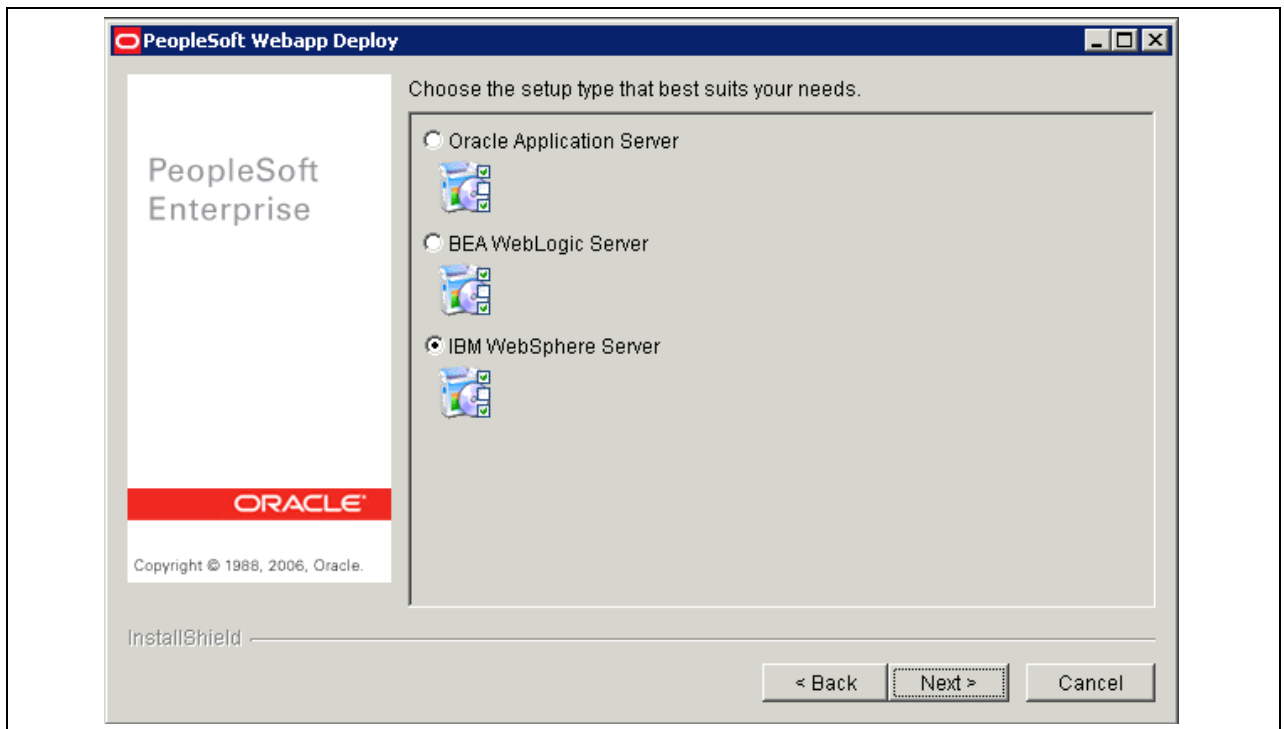
## Task 3-7-3: Installing the Dialog Execution Server on WebSphere on Microsoft Windows

To install the Dialog Execution Server on WebSphere on Microsoft Windows:

**Note.** You can find a similar screenshot in Installing the Dialog Execution Server on OAS on Windows.

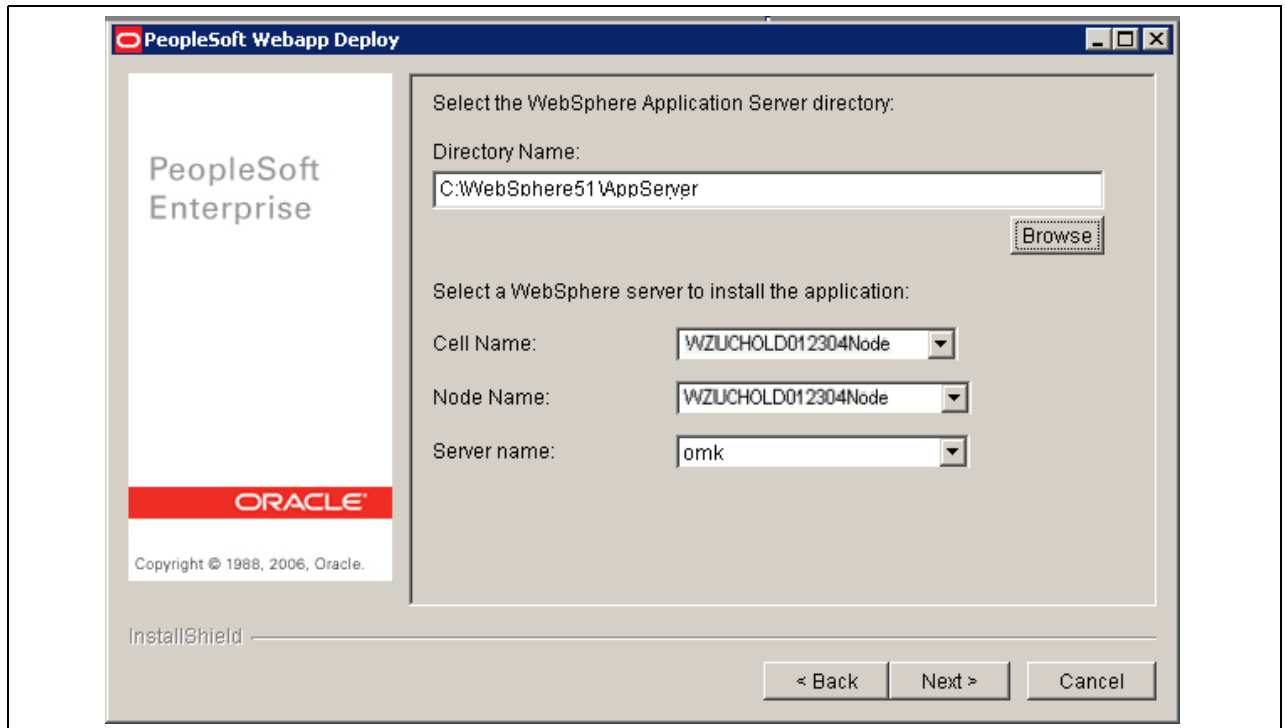
1. Go to <PS\_HOME>\setup\mpwebappdeploy and run setup.exe.

2. Click Next on the Welcome page.
3. Enter the <PS\_HOME> directory and click Next on PeopleTools directory selection page.
4. Choose IBM WebSphere Server and click Next:



Webapp Deploy window - Web server selection

5. Enter the WebSphere Application Server directory (that is, *C:\WebSphere51\AppServer*) and the server information (Cell Name, Node Name and Server Name), and then click Next:

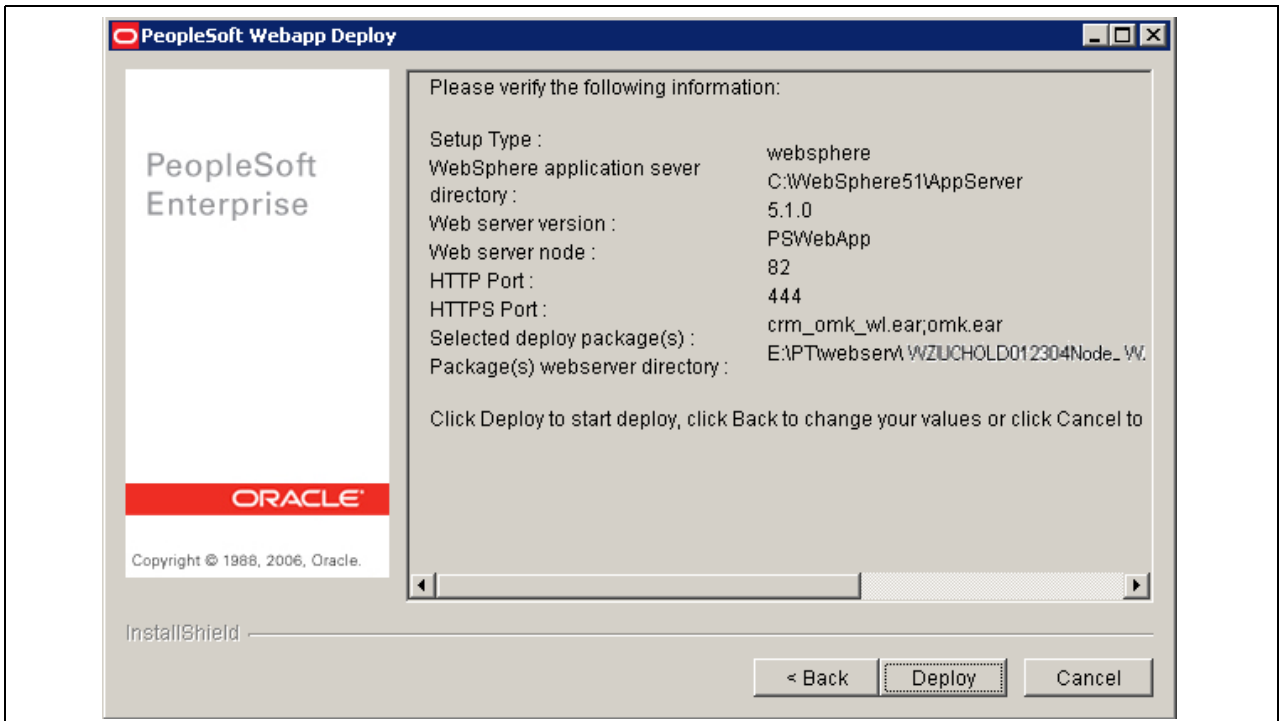


Webapp Deploy window - WebSphere application server specifications

6. Enter the application name and click Next on the Application name selection page.
7. Select the check box for CRM OMK as the application package to deploy and click Next on the Application package selection page.
8. Enter the following CRM database information and click Next on the CRM database information page.

<b>Database Type</b>	Enter <i>ORACLE</i> , <i>MSSQL</i> , or <i>DB2UDB</i> .
<b>Database Server Name</b>	Identifies the machine hosting the database.
<b>Database Port Number</b>	Enter <i>1521</i> (not applicable with <i>MSSQL</i> ; enter <i>0</i> ).
<b>Database Instance Name</b>	Identifies the database name.
<b>Database User Name</b>	Identifies the database user.
<b>Database User Password</b>	Identifies the password for the database user.

9. Enter DES HTTP and HTTPS port numbers and click Next on the DES HTTP/HTTPS port selection page.
10. Verify that the information is correct. If it is not, click Back and correct the issue. When ready, click Deploy to start the installation:



Webapp Deploy window - Summary

11. Click Finish to exit the installation.

## Task 3-7-4: Installing the Dialog Execution Server on WebSphere on UNIX

To install the Dialog Execution Server on WebSphere UNIX:

1. Go to <PS\_HOME>/setup/mpwebappdeploy and run the appropriate setup command with additional parameters as follows:
  - \$setup.aix -is:javaconsole –console
  - \$setup.solaris -is:javaconsole –console
2. The following messages appear:

```
InstallShield Wizard
Initializing InstallShield Wizard...
Searching for Java(tm) Virtual Machine.....
Welcome to the InstallShield Wizard for PeopleSoft Webapp Deploy Tool.
Using the InstallShield Wizard you will deploy PeopleSoft Application(s) on=>
your computer.
Version: 8.48
```

3. Enter / for Next to continue.
4. Choose the directory where you installed PeopleSoft, commonly known as <PS\_HOME> (/products/WebSphere51/AppServer in this example).

```
Specify a directory name or press Enter [/ds1/home/a890u40a] /products/Web=>
Sphere51/AppServer
```

5. Enter *1* for Next to continue.
6. At the next prompt, enter *2* for WebSphere:

```
[X] 1 - Oracle Application Server
[ ] 2 - BEA WebLogic Server
[ ] 3 - IBM WebSphere Server
To select an item enter its number, or 0 when you are finished: [0] 3
```

7. Enter *0* to continue.
8. Enter *1* for Next to continue.
9. Accept the default or specify the location of the WebSphere Application Server directory. For example:

```
[/usr/WebSphere/AppServer] /products/WebSphere51/AppServer
```

10. Enter *1* for Next to continue.
11. Specify the cell name as follows:

```
[X] 1 - an-ibm01Node
```

12. Enter *0* for Finished.
13. Enter *1* for Next to continue.
14. Select the appropriate node name. For example:

```
[X] 1 - an-ibm01Node
```

15. Enter *0* for Finished.
16. Enter *1* for Next to continue.
17. Select the appropriate server name. For example:

```
[X] 1 - server1
```

18. Enter *0* for Finished.
19. Enter *1* for Next to continue.
20. Select the application name or accept the default. For example:

```
[PSWebApp] OMK
```

21. Enter *1* for Next to continue.
22. Select the application package to deploy:

```
[X] 1 - CRM OMK
```

23. Enter *0* for Finished.
24. Enter *1* for Next to continue.
25. Specify the following information. For example:

```
CRM OMK:
Database Type [MSSQL] DB2UDB
Database Server Name [ ] an-ibm007
Database Port Number [0] 50004
```

```
Database Instance Name [] a890u40a
Database User Name: [Admin] a890u40a
Database User Password [] a890u40a
```

26. Enter */* for Next to continue.

27. Enter the appropriate HTTP/HTTPS port numbers for the DES server. For example:

```
HTTP Port: [80] 19850
HTTPS Port: [443]
```

---

**Important!** The HTTP and HTTPS port numbers must be different than your PIA port.

---

28. Enter */* for Next to continue.

29. Review and confirm your selections before deploying the DES server. For example:

```
Setup Type: websphere
WebSphere application sever directory : /products/WebSphere51/AppServer
Web server version: 5.1.0
Web server node : OMK
HTTP Port: 19850
HTTPS Port: 443
Selected deploy package(s): crm_omk_wl.ear
Package(s) webserver directory: /products/WebSphere51/AppServer/webserver/an->
ibm01Node_an-ibm01Node_server1
```

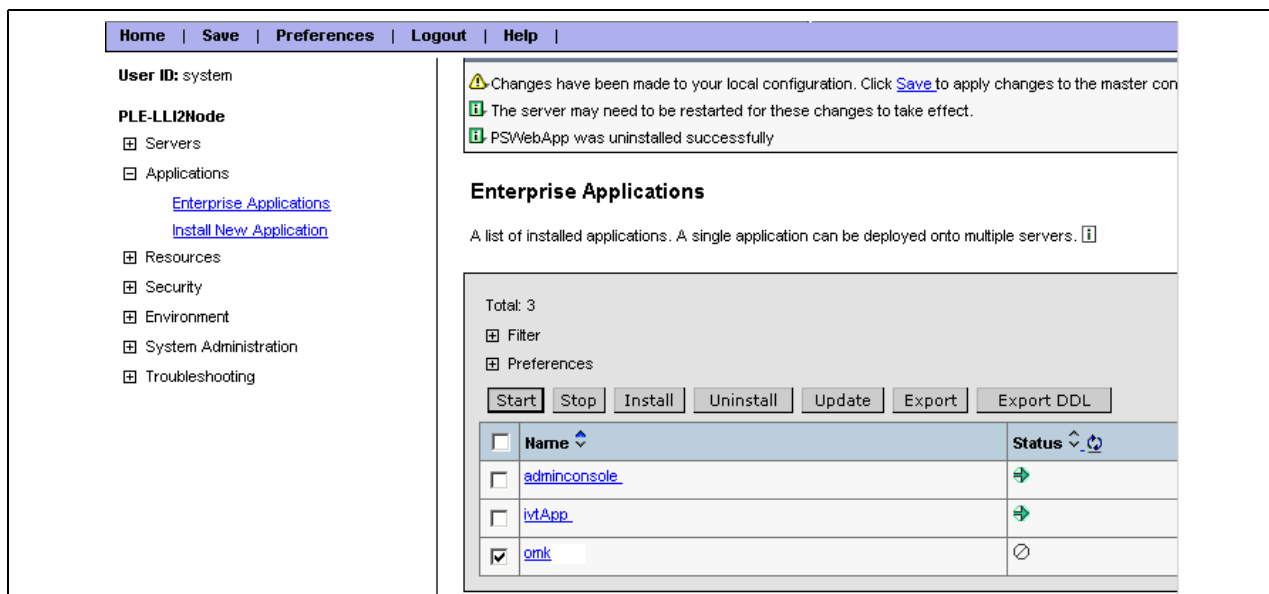
30. Enter */* to Deploy.

## Task 3-7-5: Starting the Dialog Execution Server on WebSphere

To start DES on WebSphere, use one of these two methods:

1. Restart the new web server by running the command "%WAS\_HOME%\bin\startServer.bat omk" in a command window.
2. Start the DES application directly by selecting Applications->Enterprise Applications in WebSphere Administration Console, selecting the application name (for example, omk), and clicking the Start button:





Enterprise Applications page

## Task 3-8: Installing the Dialog Execution Server on WebLogic

This section discusses:

- Prerequisites
- Installing the Dialog Execution Server on WebLogic on Microsoft Windows
- Installing the Dialog Execution Server on WebLogic on UNIX
- Starting the Dialog Execution Server on WebLogic

**Important!** An existing PIA domain on WebLogic cannot be used for the Dialog Execution server. A new WebLogic domain will be created during the Dialog Execution server installation. You cannot use the same PIA HTTP/HTTPS port number for the Dialog Execution Server HTTP/HTTPS port number.

### Prerequisites

Before installing DES on WebLogic, please make sure to shut down any running web servers to avoid web server corruption.

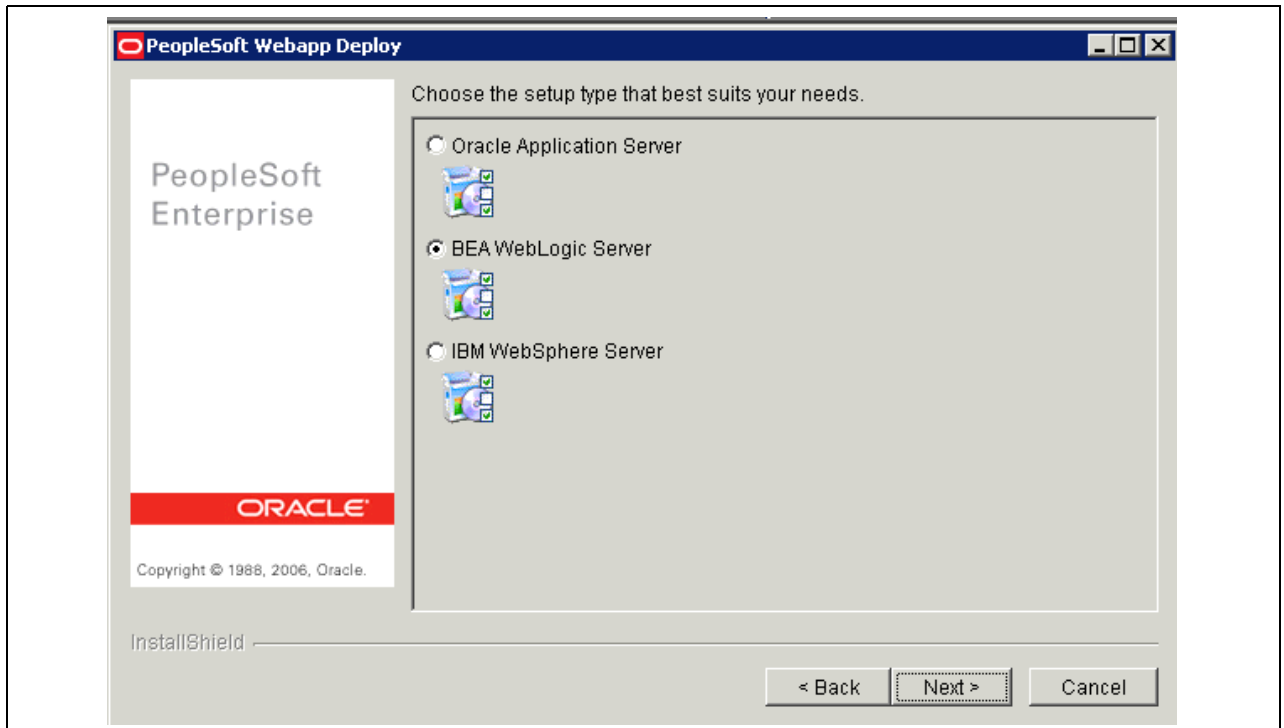
### Task 3-8-1: Installing the Dialog Execution Server on WebLogic on Microsoft Windows

To install the Dialog Execution Server on WebLogic on Microsoft Windows:

**Note.** You can find a similar window in Installing the Dialog Execution Server on OAS on Windows.

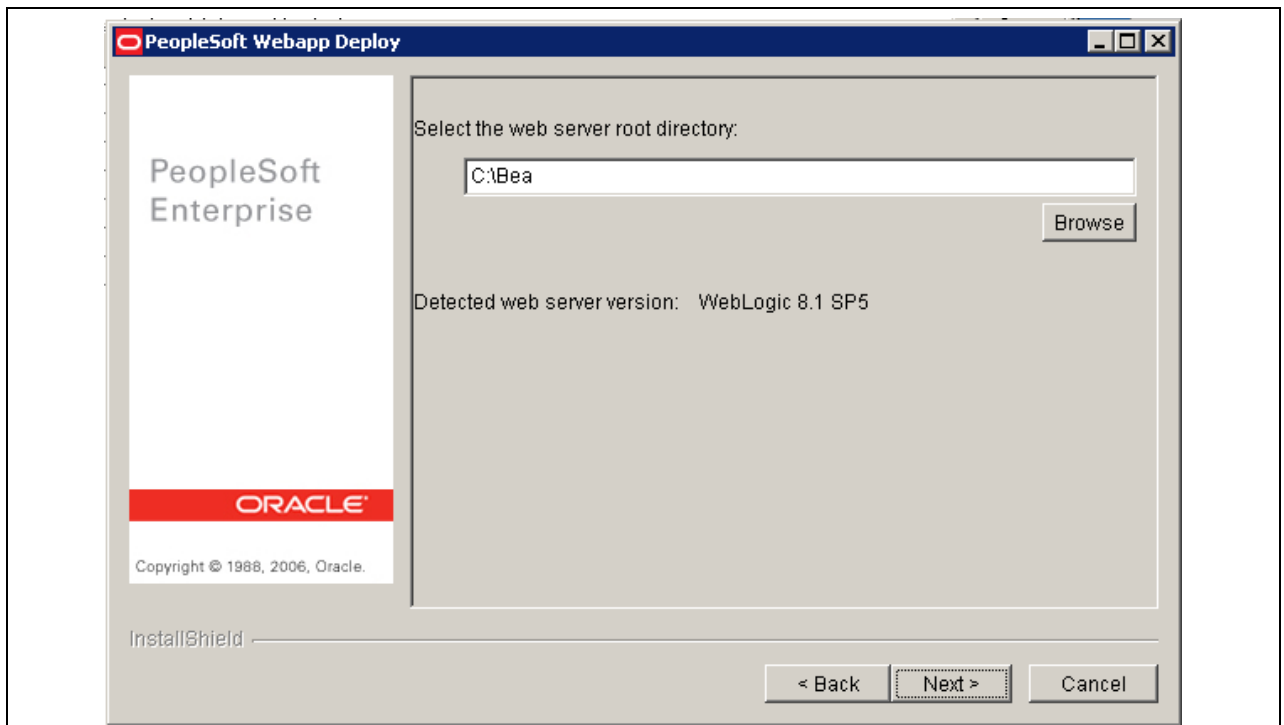
1. Go to <PS\_HOME>\setup\mpwebappdeploy and run setup.exe.
2. Click Next on the Welcome page.

3. Enter the <PS\_HOME> directory and click Next on the PeopleTools home directory selection page.
4. Select BEA WebLogic Server and click Next:




Webapp Deploy window - web server selection

5. Enter the WebLogic server root directory (for example, *c:\bea*) and click Next:



Webapp Deploy window - Select WebLogic server root directory

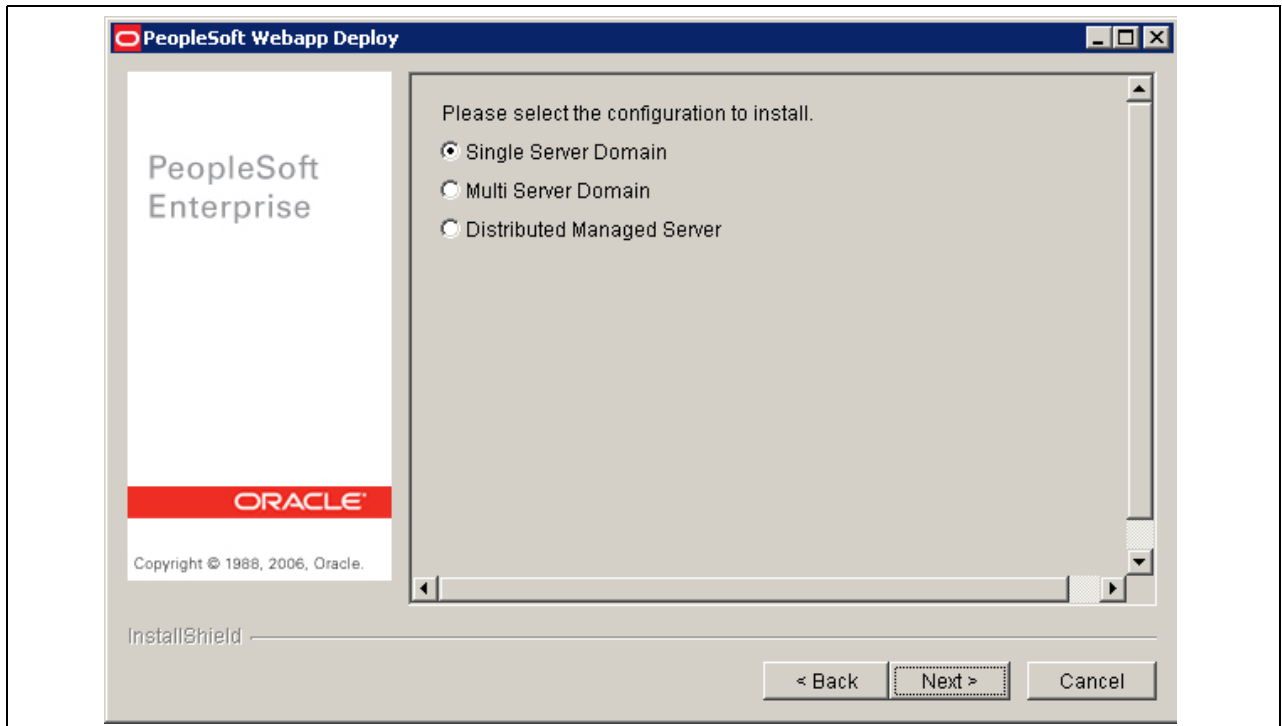
6. Enter your new domain name (for example, *omk*) and click Next on the Application name selection page. Do not use the same names you used for PeopleSoft web server domains.
7. Enter the Login and password for the WebLogic domain and click Next:



The screenshot shows a window titled "PeopleSoft Webapp Deploy". On the left side, there is a vertical panel with the "PeopleSoft Enterprise" logo and the "ORACLE" logo below it, followed by the text "Copyright © 1988, 2006, Oracle." and "InstallShield" at the bottom. The main area of the window contains the text "Please enter the administrator login and password for WebLogic domain." Below this text are three input fields: "Login ID:" with the value "system", "Password:" with the value "password", and "Re-type Password:" which is currently empty. At the bottom right of the window are three buttons: "< Back", "Next >", and "Cancel".

Webapp Deploy window - Enter WebLogic login information

8. Select *CRM OMK* as the application package to deploy and click Next on the Application package selection page.
9. Select Single Server Domain and click Next:



Webapp Deploy window - Select installation configuration

---

**Note.** This documentation does not include information on configuring a clustered server.

---

10. Enter the following CRM database information and click Next on the database information page:

<b>Database Type</b>	Enter <i>ORACLE</i> , <i>MSSQL</i> , or <i>DB2UDB</i> .
<b>Database Server Name</b>	Identifies the machine hosting the database.
<b>Database Port Number</b>	Enter <i>1521</i> (not applicable for MSSQL; enter <i>0</i> ).
<b>Database Instance Name</b>	Identifies the database name.
<b>Database User Name</b>	Identifies the database user.
<b>Database User Password</b>	Identifies the password for the database user.

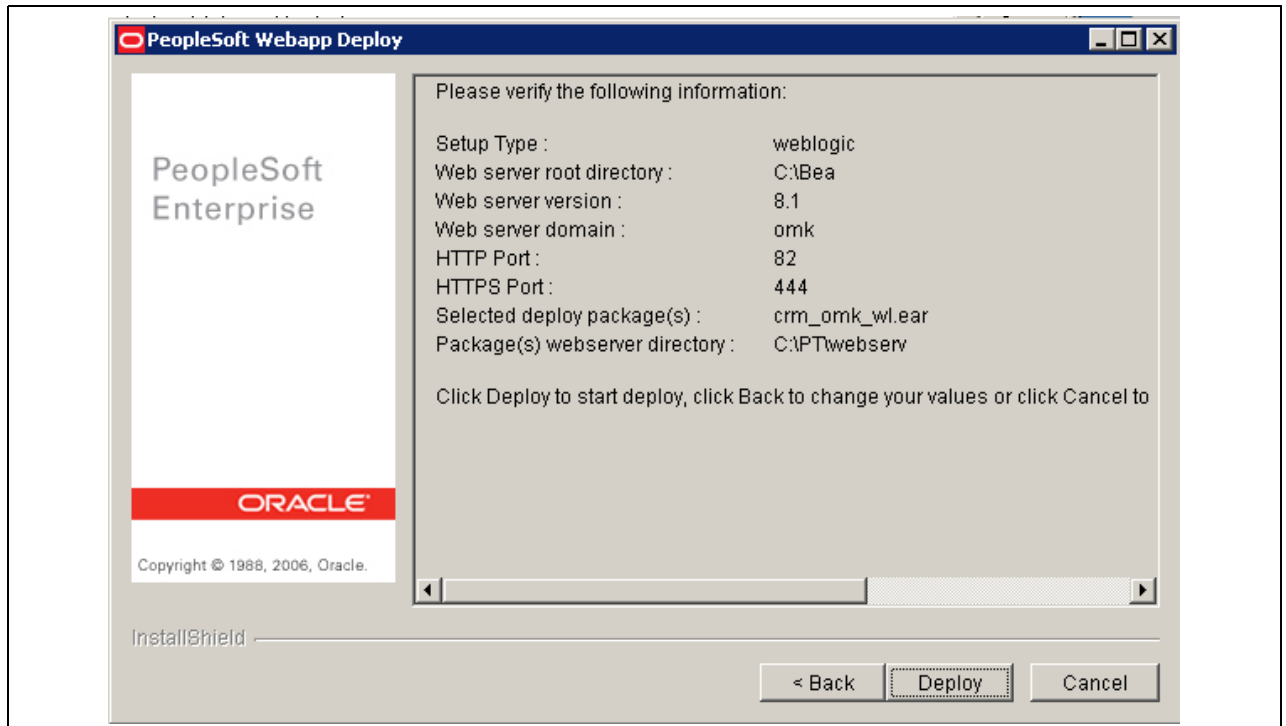
11. Enter DES HTTP and HTTPS port numbers and click Next on HTTP/HTTPS port selection.

---

**Important!** This port number must be different from your PIA port.

---

12. Verify that the information is correct. If it is not, click Back and correct the issue. When ready, click Deploy to start the installation:



Webapp Deploy window - Summary

**Note.** This process may take up to five minutes. If it does not finish in five minutes, check the DES0\_stderr.log log file in the DES installation directory for errors or information (for example, <PS\_HOME>\webserv\omk\DES\DES0.stderr.log).

13. Click Finish to exit the installation.

## Task 3-8-2: Installing the Dialog Execution Server on WebLogic on UNIX

To install DES on WebLogic on UNIX:

1. Shut down any running WebLogic web server.
2. Go to PS\_HOME/setup/mpwebappdeploy.
3. Run one of the following commands:
  - \$setup.aix -is:javaconsole -console
  - \$setup.solaris -is:javaconsole -console
4. The following message appears:

```
InstallShield Wizard
Initializing InstallShield Wizard...
Searching for Java(tm) Virtual Machine.....
Welcome to the InstallShield Wizard for PeopleSoft Webapp Deploy Tool.
Using the InstallShield Wizard you will deploy PeopleSoft Application(s) on⇒
your computer.
Version: 8.48
```

5. If you are installing onto a BEA WebLogic Server, make sure to shut down any running web servers to avoid web server corruption.

6. Enter *I* for Next to continue.

7. Choose the directory where you installed PeopleSoft, commonly known as "PS\_HOME" as follows:

```
Please specify a directory name or press Enter [/ds1/home/a890u40a] e.g. /ds2⇒
/home/upgtest2/c890t208
```

8. Enter *I* for Next to continue.

9. Enter *I* to select the BEA WebLogic server:

```
[X] 1 - BEA WebLogic Server
[ ] 2 - IBM WebSphere Server
```

10. Enter *0* to finish.

11. Enter *I* for Next to continue.

12. Specify the web server root directory information. For example:

```
Directory name: [/opt/bea] /ds2/home/upgtest2/bea81
Detected web server version: Weblogic 8.1 SP2
```

13. Enter *I* for Next to continue.

14. Enter the Domain Name or enter *0* to select Default: *[PSWebApp]*

15. Enter *I* for Next to continue.*[I]*

16. Specify the login and password, or press ENTER to accept the default.

```
Login ID: [system]
Password: [password]
Re-type password: [password]
```

17. Enter *I* for Next to continue.

18. Select the application package to deploy:

```
[X] 1 - CRM OMK
```

19. Enter *0* to indicate you are finished with this step.

20. Enter *I* to select the configuration to install:

```
[X] 1 - Single Server Domain
[ ] 2 - Multi-Server Domain
[ ] 3 - Distributed Managed Server
```

21. Enter *I* for Next to continue.

22. Specify the database information. For example:

```
CRM OMK:
Database Type: [MSSQL] ORACLE
Database Server Name: [ ] an-ibm007
Database Port Number: [0] 1521
```

```
Database Instance Name: [] C890T208
Database User Name: [Admin] SYSADM
Database User Password: [] SYSADM
```

23. Enter */* for Next to continue.

24. Enter the HTTP and HTTPS port numbers for DES server. For example:

---

**Important!** These HTTP port numbers must be different from your PIA port.

---

```
HTTP Port: [80] 8007
HTTPS Port: [443]
```

25. Enter */* for Next to continue.

26. Review and confirm your selections before deploying the DES server. For example:

```
Set up Type: Weblogic
Web server root directory: /ds2/home/upgtest2/bea81
Web server version: 8.1
Web server domain: PSWebApp
HTTP Port: 8007
HTTPS Port: 443
Selected deploy package(s):
Package(s) web server directory: /ds2/home/upgtest2/c890t208/webserv
```

27. Enter */* to deploy.

### Task 3-8-3: Starting the Dialog Execution Server on WebLogic

To start DES on WebLogic, run the command "%PS\_HOME%\webserv\omk\startPSWEBAPPS.cmd" in a command window.

---

## Task 3-9: Retrieving and Installing JDBC Drivers

This section discusses:

- Downloading JDBC Drivers
- Installing JDBC Drivers

---

**Note.** OLM requires the installation of the JDBC driver on the PeopleSoft Application Server and the Dialog Execution Server.

---

### Task 3-9-1: Downloading JDBC Drivers

If the CRM database is installed on an Oracle, MSSQL or DB2/LUW database, the proper JDBC drivers must be downloaded and installed for OLM.

The drivers are:

- Oracle: 10g ojdbc14.jar, which can be downloaded from [http://www.oracle.com/technology/software/tech/java/sqlj\\_jdbc/index.html](http://www.oracle.com/technology/software/tech/java/sqlj_jdbc/index.html)
- MSSQL: 2005 sqljdbc.jar, which can be downloaded from <http://www.microsoft.com/downloads/results.aspx?docId=&freetext=JDBC>
- DB2/LUW: The DB2 JDBC driver comes with licensed Jar files. The files can be found in the “java” directory (or “java12” on some installs) under the DB2/LUW home directory on the database server either on UNIX or Microsoft Windows. The following three files are needed:
  - db2jcc.jar
  - db2jcc\_license\_cu.jar
  - db2jcc\_license\_cisuz.jar

## Task 3-9-2: Installing JDBC Drivers

Before beginning this procedure, download the JDBC driver.

1. Install the JDBC driver for the PeopleSoft Application Server in the classes directory as follows:
  - UNIX: Copy the jar files into <PS\_HOME>/appserv/classes.
  - Windows: Copy the jar files into %PSHome%\class.
2. Install the jdbc driver in the DES:

---

**Note.** You must replace <omkapp> with your DES domain name, that is, PSWebApp or omk.

---

- a. Copy the jar files to the following locations:

DES on	UNIX	Windows
OAS	%OraHome%/j2ee/<omkapp>/applications/ /<omkapp>	%OraHome%/j2ee/<omkapp>/applications/ /<omkapp>
WebLogic	%PSHome%/webserv/%DOMAIN_NAME% /applications/crm9/	%PSHome%\webserv\%DOMAIN_ NAME%\applications\crm9\
WebSphere	<WebSphereInstallRoot>/AppServer/lib	<WebSphereInstallRoot>\AppServer\lib

- b. Add the driver jar files into the DES classpath as follows:



DES on		
OAS	Modify the file MANIFEST.MF to (the added <jdbc_jar_file_name> is in bold font and needs to be replaced by ojdbc14.jar, sqljdbc.jar or db2jcc.jar, db2jcc_license_cu.jar, db2jcc_license_cisuz.jar).	Manifest-Version: 1.0 Class-Path: com.peoplesoft.crm.omk.jar ptib.jar psjoa.jar xalan.jar xerces.jar commons-fileupload-1.0.jar commons-net-1.2.2.jar toplink.jar <jdbc_jar_file_name> Created-By: Oracle.
	Location of MANIFEST.MF on UNIX.	<OraHome>/j2ee/omk/applications/omk/com.peoplesoft.crm.omk/META-INF
	Location of MANIFEST.MF on Windows.	<OraHome>\j2ee\<omkapp>\applications\<omkdapp>\com.peoplesoft.crm.omk\META-INF
WebLogic	Modify the file setenv.cmd/setenv.sh (the added <jdbc_jar_file_name> is in bold font and needs to be replaced by ojdbc14.jar, sqljdbc.jar or db2jcc.jar, db2jcc_license_cu.jar, db2jcc_license_cisuz.jar).	SET PSCLASSPATH=%PS_HOME%\webserver\%DOMAIN_NAME%\lib\ps_patch.jar;%PSHome%\webserver\%DOMAIN_NAME%\applications\crm9\<jdbc_jar_file_name>;
	Location of setenv.sh on UNIX.	<PS_HOME>/webserver/<DOMAIN_NAME>
	Location of setenv.cmd on Windows.	<PS_HOME>\webserver\<DOMAIN_NAME>

## Task 3-10: Testing the Dialog Execution Server Installation

Before testing the DES installation, be sure that you:

- Stop the application server, clear the cache, and restart the application server.
  - Start the Dialog Execution Server.
1. Test the communication to the server and that Online Marketing was installed:
    - Go to <http://<webserver>:<port>/DCS/mcp?rut=1>.
    - If the connection is working properly, this web page displays the message “i am here.”
  2. Test to verify database connectivity with the web server:
    - Go to <http://<webserver>:<port>/DCS/mcp?rutdb=1>.
    - If the connection and the database are working properly, this web page displays the message “db: i am here.”
  3. Test to verify JOLT connectivity with the web server:
    - Go to <http://<webserver>:<port>/DCS/mcp?rutas=1>.
    - If the connection and the application server are working properly, this web page displays the message “as: i am here.”
  4. Test to verify FTP connectivity with the FTP server:
    - Go to <http://<webserver>:<port>/DCS/mcp?rutftp=1>.

- If the connection and the application server are working properly, this web page displays the message “ftp: i am here.”
5. Check if the DES log files contain errors.

---

**Note.** For a DES UNIX installation, the user should log into the machine using the same web server and application server user ID.

---

Check the log files as follows:

- For OAS, the log will be in the following directories:
    - <OraHome>\j2ee\<domain name>\applications\<domain name>\DES\DES0.stderr.log
    - <OraHome>\j2ee\<domain name>\applications\<domain name>\DES\log\DES1\_Debug.log
  - For WebSphere, the log will be in the following directories:
    - <PS\_HOME>\websrv\ <domain name>\DES\DES0.stderr.log
    - <PS\_HOME>\websrv\ <domain name>\DES\log\DES1\_Debug.log
  - For WebLogic, the log will be in the following directories:
    - <PS\_HOME>\websrv\<domain name>\DES\DES0.stderr.log
    - <PS\_HOME>\websrv\<domain name>\DES\log\DES1\_Debug.log
6. Test to verify that DES is accessible from PIA
    - a. Log in to PIA.
    - b. Select Marketing, Dialog Monitoring, Control Center, Server Monitor.
    - c. Click the Timer Status button.
    - d. Check if the message *Scheduler Timer is running* will return.
  7. Test to verify the Integration Broker for OLM as follows:
    - a. Select PeopleTools, Integration Broker, Integration Setup, Node Definitions.
    - b. Search and open the node PSFT\_OLM.
    - c. Click the Connectors tab.
    - d. Click the Ping Node button and verify that the node was pinged successfully.

---

## Task 3-11: Testing the Email Server

You must obtain and install a third-party email server recommended by Oracle (this server is not provided by Oracle). After it is installed, test the server to ensure that it is operational.

Perform the following tests:

- If ping is enabled on your servers, ensure that the email server can ping to and can be pinged from the machine where the Online Marketing Mailcaster will be installed.
- On the Mailcaster system, telnet to port 25 of the email server to test SMTP connectivity as follows:

```
telnet <emailserver> 25
HELO there
```

QUIT

- Create a POP account on your mail server.
- On the Mailcaster system, telnet to port 110 to test POP account connectivity:

```
telnet <emailserver> 110
HELO there
QUIT
```

## Task 3-12: (Optional) Adding Standalone Dialog Servers, Mailcaster, ERP, and Watchdog

If you are running your batch servers on UNIX and want to run enterprise resource planning (ERP), you will first need to copy the ptib.jar file from the DES install to the <PS\_HOME>/setup directory on the batch server.

**Note.** This task is not required for Microsoft Windows and is only needed if you plan to run ERP on the system.

To add standalone dialog servers, make sure the process scheduler is started:

1. Select Marketing, Dialog Monitoring, Control Center, Maintain Dialog Servers:

*Server Name	*Instance Type	Service Type	Instance	Server Status	Request Status			
NT Server Agent	Mail Service	Single Emailer	1	Running	fully functional	Start	Stop	
NT Server Agent	Mail Service	Mailcaster	2	Running	fully functional	Start	Stop	
PSNT4	Mail Service	Mailcaster	3	Running	fully functional	Start	Stop	
PSNT4	Mail Service	Single Emailer	4	Running	fully functional	Start	Stop	
PSNT4	Mail Service	Mailcaster	5	Running	fully functional	Start	Stop	
NT Server Agent	Mail Service	Mailcaster	6	Running	fully functional	Start	Stop	
NT Server Agent	Watch Dog			Stopped	Create Requested	Start	Stop	

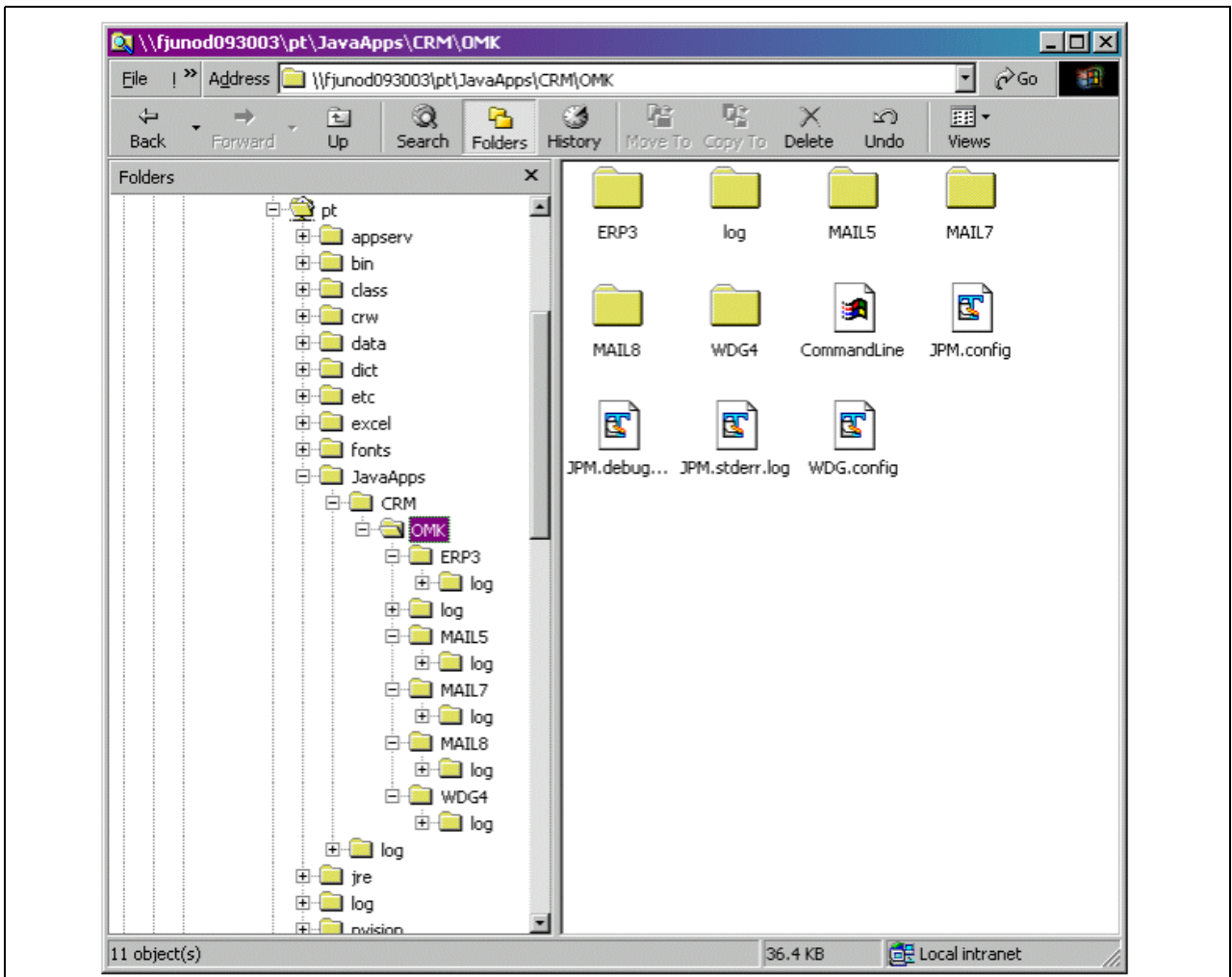
Buttons: Create a new Instance, Refresh, Save

Maintain Dialog Servers page

2. Click the Create a New Instance button.
3. Select one of your Process Scheduler servers under Server Name.
4. Select the type of service you want to add. The choices are “E-Mail Response Processor,” “Mail Service,” or “Watch Dog.” The next steps vary depending on which server type you choose.
5. If you select *E-Mail Response Processor*, select one of the following Service Type options, and click Save:
  - Bounce Process for managing mail bounces for cases where the mail was sent to a user who did not exist.
  - Reply Process for managing reply mails from users who do exist.

6. The request status will be “Create Requested” and should eventually change to “Create Successful” if the process succeeded or to “Create Failed” if it failed.

This step creates a PS\_HOME/JavaApps/CRM/OMK/ERP3 directory under the selected Process Scheduler installation, as shown in this example:



Example of an OMK directory

7. Go to the installation directory and edit either the bounce.script or reply.script, depending on what you installed.

Both are located in this directory in case you want to change the behavior of this ERP instance.

Many parameters need to be modified here, as not all of the needed information will be available at install time. See the ERP documentation for details on how to configure the ERP instance. Some fields will be prepopulated with information that was available at the time of the install.

The `commandLine` file in the same directory is the command that will be run to start this instance of ERP. If you want to modify the ERP server type (bounce, reply, or both), change the script included at the end of the command. You may include both, and the ERP process will do both. More information is available in the ERP documentation.

You probably want both bounce and reply processing to be done, so you should set up both script files and change the `commandLine` file to include both script file names on the command line.

8. If you select *Mail Service*, select one of the following Service Type options and then click Save:

- *Mailcaster* to send bulk mails.
  - *Single Mailer* to send single mails.
  - *Frequency Mailer* to queue the bulk mails and single mails according to the Frequency policy.
9. The request status will be “Create Requested” and should eventually change to “Create Successful” if the process succeeded or to “Create Failed” if it failed.  
This step creates a <PS\_HOME>/JavaApps/CRM/OMK/MCR1 directory under the selected Process Scheduler installation.
  10. You can review the `MCR.config` file found in the created directory, but you should not need to modify it unless you want to make any special changes.
  11. If you want to change the type of mail service (for example, from bulk to single), edit the `commandLine` file and change the “-t” parameter.  
Use “single” for single mailer, “bulk” for bulk mail and “frequency” for frequency mail.
  12. If you select *Mail Server*, use it to install another service type. As you will need both a single mailer and a bulk mailer or also a frequency mailer, repeat the installation of the mail service again (steps 8 through 11), but this time, choose the other service type. This service type will be installed as MCR2 or CRM3.
  13. *Watch Dog* has no service types, so if you select *Watch Dog*, just click Save.

---

**Note.** Adding additional services of each type will increase the generated instanceID. The names of the created directories will reflect this instance ID (for example, Mail Service with instance ID of 3 will create an MCR3 directory).

---

14. The request status will be “Create Requested” and should eventually change to “Create Successful” if the process succeeded or to “Create Failed” if it failed.
15. This step creates a <PS\_HOME>/JavaApps/CRM/OMK/WDG1 directory under the selected Process Scheduler installation.
16. Edit the `WDG.config` file. The Watchdog configuration file is complicated; therefore, you should review the Watchdog documentation before attempting to configure this file.
17. If installing more than one Watchdog on the same machine, the `qkLookPort` needs to be set differently in each of the config files. However, there is little reason to run more than one Watchdog on the same server.
18. To start one of the services, click the Start button and then click Save. Clicking Save is required.

---

**Note.** The Start button is not active until the services are in a “Create Successful” state.

---

This action should set the state to “Run Requested,” which will eventually change to “Fully Functional.” If the state becomes “Run Request Failed,” further diagnosis is needed. Many log files exist in the JavaApps directory tree to help with further diagnosis.

19. To stop a service, click the Stop button and click Save (the save is required).

---

**Note.** The Stop button is not active unless a service is running.

---

This action should change the state to “Stop Requested,” which will eventually change to “Shutdown Normally” or “Timed Out or killed by process monitor.” Either way, the process has stopped. If the state changes to “Stop Request Failed,” then further investigation is needed.

20. To delete the service, wait until the process stops and the trashcan button becomes active. Click the trashcan button and click Save to delete the service.

---

**Note.** If a firewall is in use between the DES server and the Mailcasters, two parameters can be used to force the mailcaster's RMI server object to listen on a specific port. The following configuration parameters must be added to each MCR.config file:

---

- HAS\_FIREWALL=true
- FIREWALL\_PORT=<PORT#>

PORT# is the number of the port that has been opened in the firewall.

---

**Note.** The default RMI port, 1099, or the port specified in the RMIPORT config parameter will also need to be opened in the firewall. It is the port through which the DES will connect to the RMI registry.

---

## Task 3-13: Setting Up User Installation of the Adobe SVG Plug-In

The Dialog Designer used in Enterprise Online Marketing uses Scalable Vector Graphics (SVG) to allow drag-and-drop functionality in a web interface.

For a normal web browser to have these capabilities, the installation of a viewer plug-in is required. The required plug-in is created by Adobe and is called the SVG Viewer. Enterprise Online Marketing requires version 3.0 or higher of the viewer.

To allow for a controlled installation of the Adobe SVG Plug-In by users, a mechanism is provided to give access to the installation files.

---

**Note.** If a user's system already has the SVG Viewer 3.0 or higher, there is no need to reinstall it.

---

To set up the user installation facility:

1. Determine the version of the SVG Viewer that suits your user base, and locate the proper installation files for that version on the Adobe website.

Currently, all versions can be found at the following web address, although this location is subject to change:

<http://www.adobe.com/svg/viewer/install/main.html>

2. After the location of the installation has been established, IT personnel have the choice to either download the executable and save it locally on an internal web server, or they can point the file location to Adobe's site.

This information becomes relevant in the following steps for setting up the internal location.

3. Select PeopleTools, Utilities, Administration, URLs.
4. Search for the URL RYE\_SVGURL and open it.

The RYE\_SVGURL URL is where the Dialog Designer application will look for the SVG Viewer installation file; therefore, for the application to function correctly, the URL field must contain the location of the installation files. The field is provided by default from the last known correct URL for the Windows version of the Viewer located on Adobe's website. If this URL is no longer valid or the location of the installation is different, you must update the field:

**URL Maintenance**

**URL Identifier:** RYE\_SVGURL

**Description:** Location of SVG Viewer

**URL:** http://download.adobe.com/pub/adobe/magic/svgviewer/win/3.x/3.0/en/SVGView.exe

**Comments:** Used by the Dialog Designer for Online Marketing. URL should be the location of the executable installation for the SVG viewer.

Save Return to Search Add Update/Display

URL Maintenance page for RYE\_SVGURL

5. Save.
6. At this point, if a user clicks the Install SVG Viewer button on the Dialog Option page in the Dialog Designer, the installation starts:

**Dialog Designer**

**Options**

**Dialog Name:** Insurance Profile Update Dialog **Status:** In Design

Dialog Options are used to change the behavior of the Dialog Designer and the Dialog when it has been made live. Changing Dialog options affect only the current Dialog and are not systemwide settings.

**Matching Options**

- ☒ Use Individual Rules
- ☒ Use Organization Rules

**General Options**

- ☒ Filter Character Sets

**Graphical UI Options**

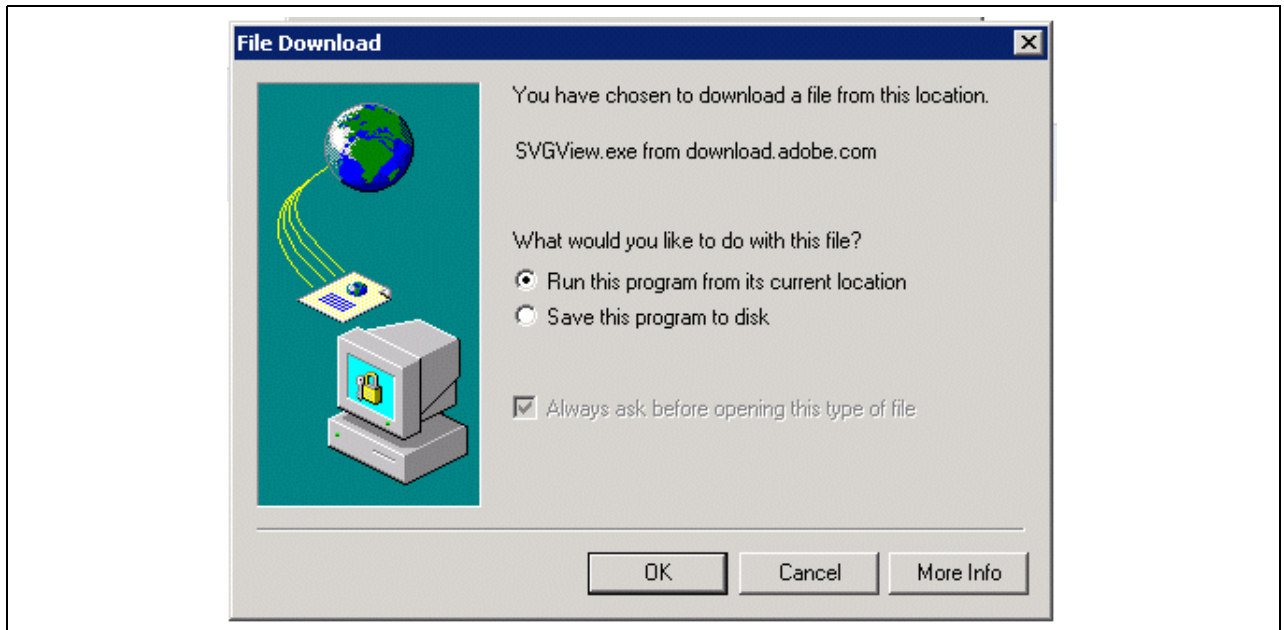
- ☒ Use Graphical Designer
- Canvas Height: 5000
- Canvas Width: 5000
- Viewing Window Height: 360
- Viewing Window Width: 745

[Return to Dialog Designer](#)

Install SVG Viewer

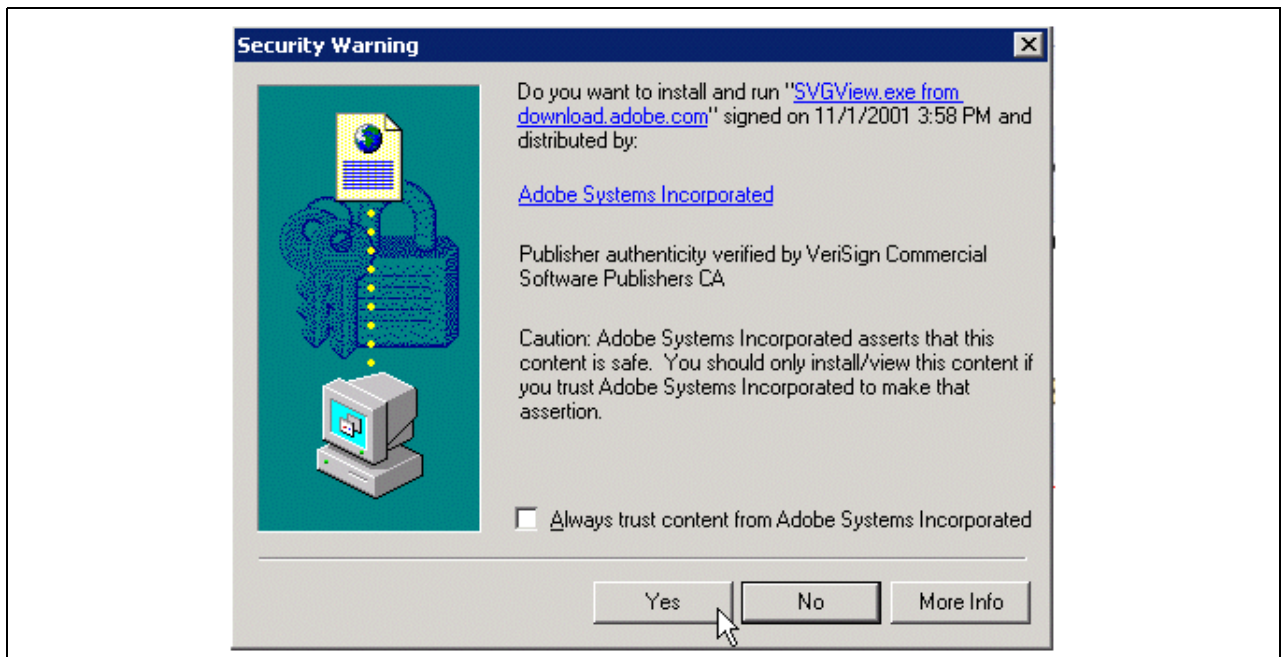
Dialog Designer page

7. When the user clicks the Install SVG Viewer button, the user will be prompted to take some actions. Select the Run this program from its current location option, and click OK:



File Download dialog box

8. Click the Yes button at the installation prompt to commence the installation:



Security Warning dialog box



## Task 3-14: Setting Up Profile-Related Parameters

### Task 3-14-1: Setting Up Automatic Numbering for Profiles

Complete these tasks to define the automatic number initial value for profiles to allow Oracle to deliver system profiles in future releases:

- Select Set Up CRM, Common Definitions, Codes and Auto Numbering, Automatic Numbering.
- Set setID to *SHARE* and Number Type to *Profile*.
- If no row matches, then click *Add a New Value*, otherwise open it.
- Enter or verify the settings shown in the following page and click Save.

**Note.** If the existing value is greater than 20,000, then don't change the existing value.

The screenshot shows the 'Profile Automatic Number' page. At the top, there are labels for 'SetID' (SHARE), 'Number Type' (PROF), and '\*Field Name' (RA\_PROFILE\_ID). Below this is a table with columns: '\*Start Seq', '\*Max Length', '\*Description', 'Last Number Issued', and 'Default?'. The table contains one row with values: 000, 18, Profile Id, 20000, and a checked box. At the bottom, there are buttons for 'Save', 'Return to Search', 'Add', and 'Update/Display'.

Profile Automatic Number page

### Task 3-14-2: Setting Up Profile Reserved Word when the Base Language of the CRM Database Is a Language Other than English

If the base language of your CRM database is a language other than English, you must:

1. Run the Data Mover Script *resetreservedwords.dms* in PeopleSoft Dialog Mover.
2. Run the Application Engine program *RA\_PROF\_CACH* from PeopleSoft Application Designer to refresh the Application profile cache.
3. Sign on to PIA and manually open and immediately save each of the documents in the DEMO database.  
This action only applies to demo databases.
4. Stop and restart the PeopleSoft Application Server, and clear the server cache. Also, stop and restart the Dialog Execution Server.

If the name of any of these profile fields—Individual.People.Role Type, Individual.People.Do Not Email, and Individual.People.Organization Role Type—were modified and the profile reactivated, you'll need to update the configuration parameters as follows:

1. Select Set Up CRM, Product Related, Online Marketing, Setting.
2. Change the parameter *doNotEMailProfileElementName* value to the value of Individual.People.Do Not Email.
3. Change the parameter *roleTypeIdProfileElementName* value to the value of Individual.People.Role Type.

4. Change the parameter `orgRoleIdProfileElementName` value to the value of `Individual.People.Organization Role Type`.
5. Save.

## Task 3-15: (Optional) Tuning the System

This section discusses:

- Improving Online Marketing Transaction Performance
- Starting the Daily Survey Report Data Purge Process Scheduler
- Checking the "Heap Size" Allocated by the Java Virtual Machine for DES

### Task 3-15-1: Improving Online Marketing Transaction Performance

For Online Marketing inserts to be performed properly, the settings of the security of the PERSON object need to be set to Scheduled Always as follows:

**Note.** If you are going to run the OLM and Student Administration integration demo Dialogs, this task must be complete.

1. Navigate to Set Up CRM, Security, CRM Application Security, Security Object.
2. Search for Object ID by *PERSON*.
3. Modify the Cache Option to "Scheduled Always":

The screenshot shows the 'Security Object' configuration page. At the top, there are buttons for 'Save', 'Run', 'Search', 'Next', 'Previous', 'Refresh', and 'Add Security Object'. Below these, the 'Object ID' is 'PERSON' and the 'Object Name' is 'Person'. The 'Security Object Definition' section contains several fields: '\*Object Name' is 'Person', '\*Object Type' is 'Membership', 'Description' is 'Person Security Object', '\*View Record' is 'RSEC\_SL\_PER\_VW', '\*Security List Record' is 'RSEC\_ML\_PERSON', 'Object Source Navigation' is 'Person Search', 'Static List Navigation' is 'Person Static Member List', and 'Cache Option' is 'Scheduled Always'.

Security Object page

4. Save.

### Task 3-15-2: Starting the Daily Survey Report Data Purge Process Scheduler

Generating Survey ACE reports frequently increases the data volume in the report table and affects the performance of report generation. Therefore, starting a daily based report data purge process will help to maintain the performance of Survey ACE report generation.

To start a daily based report data purge process:

1. Select PeopleTools, Process Scheduler, System Process Requests.
2. Create a new Run Control ID: *OLM\_ACE\_REPORT\_PURGE*.
3. Click the Run button.
4. Select the check box for the Process name *RY\_RPT\_SV\_CP*:

**Process Scheduler Request**

User ID: VP1 Run Control ID: OLM\_ACE\_REPORT\_PURGE

Server Name: PSNT Run Date: 03/28/2006  
 Recurrence: Run Time: 11:06:19AM  
 Time Zone: Reset to Current Date/Time

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Generates 2 Copies of XRFWIN	XRFWIN2	SQR Report	Web	PDF	<a href="#">Distribution</a>
<input type="checkbox"/>	Cross Reference Window Listing	XRFWIN	SQR Report	Web	PDF	<a href="#">Distribution</a>
<input type="checkbox"/>	<a href="#">All SQR Xref Reports</a>	SQRXRF	PSJob	(None)	(None)	<a href="#">Distribution</a>
<input checked="" type="checkbox"/>	RY_RPT_SV_CP	RY_RPT_SV_CP	Application Engine	Web	TXT	<a href="#">Distribution</a>
<input type="checkbox"/>	Email Freq. Policy batch count	RY_EM_CNT	Application Engine	Web	TXT	<a href="#">Distribution</a>
<input type="checkbox"/>	RY_BNC_UPDT	RY_BNC_UPDT	Application Engine	Web	TXT	<a href="#">Distribution</a>

OK Cancel Refresh

Process Scheduler page

5. Click the OK button.

### Task 3-15-3: Checking the "Heap Size" Allocated by the Java Virtual Machine for DES

Allocate an appropriate amount of memory based on the DES usage.

Verify if **-Xms32m -Xmx300m -XX:MaxPermSize=128m** has been specified in the DES JAVA options.

To check the DES Java options:

- For DES on OAS:
  1. Log on to the OAS admin console.
  2. Open the DES OC4J instance (that is, omk) and select the Administration tab.
  3. Click the Server Properties link.
  4. Check the value of **Java Options** in the **Command Line Options** section.
  5. If **-Xms32m -Xmx300m -XX:MaxPermSize=128m** isn't there, add it and click the Apply button.
- For DES on WebLogic:
  - Open the DES SetEnv file and check the Java options.
  - Check the value of **SET JAVA\_OPTIONS\_WIN32=**.
  - If **-Xms32m -Xmx300m -XX:MaxPermSize=128m** isn't there, add it and save the file.
- For DES on WebSphere:

If Heap dumps and JavaCore dumps are being generated in WebSphere in the <WebSphereRoot>/AppServer directory, increasing the maxHeapSize to 512 megabytes may help.

```
<WebSphereRoot>\config\cells\<Nodename>\nodes\<Nodename>\servers\<omkserver>=>
\server.xml
  has following...the maxHeapSize is in Megabytes
<jvmEntries XMI:id="JavaVirtualMachine_1"
  verboseModeClass="false"
verboseModeGarbageCollection="false"
verboseModeJNI="false"
initialHeapSize="0"
maximumHeapSize="256"
runHProf="false"
hprofArguments=" "
debugMode="false"
debugArgs="-DJava.compiler=NONE -Xdebug -Xnoagent -Xrunjdwp:transport=dt_=>
socket,server=y,suspend=n,address=7777"
genericJvmArguments=" ">
...
</jvmEntries>
```

---

**Note.** After modifying the Java options, you'll need to restart the DES.

---

## CHAPTER 4

# Installing PeopleSoft Enterprise Order Capture Self-Service 9

This chapter discusses:

- Understanding Order Capture Self-Service
- Understanding the Guest User Role
- Understanding the Homepage URL
- Defining the Guest User
- Disabling the New Window URL

---

## Understanding Order Capture Self-Service

This chapter explains the additional installation steps necessary for setting up the PeopleSoft Enterprise Order Capture Self-Service with the PeopleSoft Pure Internet Architecture. These instructions assume that you have already installed and configured a PeopleSoft Enterprise Customer Relationship Management (CRM) 9 database following the instructions given earlier in this guide.

See “Installing CRM 9 Applications.”

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**Note.** You should consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on the PeopleSoft Customer Connection website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

---

PeopleSoft Order Capture Self-Service is an externally facing application; therefore you should implement Order Capture Self-Service on separate web and application servers from your other internally facing PeopleSoft enterprise applications. This setup will improve performance, increase security, and decrease downtime for your website.

### See Also

*Enterprise PeopleTools 8.48 Installation (for your database platform)* PeopleSoft Customer Connection, (Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes, Enterprise, PeopleTools)

“PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index,” PeopleSoft Customer Connection, (Support, Documentation, Documentation Updates, Enterprise, Customer Relationship Management, All Products)

*Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration*

## Understanding the Guest User Role

PeopleSoft Order Capture Self-Service does not use the standard PeopleTools signon screen. Instead, all visitors to your site are automatically signed in with a default User ID of your choice (referred to as the guest user for the remainder of this document). The guest user ID determines the default language and business unit for your site. The guest user must be defined and assigned the following roles:

- Guest
- PeopleSoft Guest

We deliver a sample GUEST user profile as an example.

To view the sample GUEST user, access PeopleTools, Security, User Profiles. Use this example to understand how to set up a guest user correctly. You can clone the profile if necessary. The guest user definition determines the default language and business unit used on your site:

The screenshot shows the 'General' tab of the 'User Profile' page in PeopleTools. The user ID is 'GUEST' and the description is 'Guest'. The 'Logon Information' section includes fields for Symbolic ID (sa), Password, Confirm Password, and User ID Alias. There are checkboxes for 'Account Locked Out?' and 'Expire password at next login'. The 'General Attributes' section includes fields for Language Code (English), Currency Code (US Dollar), and Default Mobile Page. There is a checkbox for 'Enable Expert Entry'. The 'Permission Lists' section shows four rows: Navigator, Homepage, Process Profile, and Row Security, all set to 'ALLPAGES' with an 'Explain' link next to each.

Example of User Profile - General page

The business unit is defined on the Overall Preferences page, under Set Up CRM, Security, User Preferences. This business unit must be a valid Order Capture business unit:

Overall Preferences		Call Center	Sales	Change Management
<b>User ID</b> GUEST				
<b>Description</b> Guest				
<b>Overall Preferences</b>				
<b>Business Unit</b>	APP01		Appliances	
<b>SetID</b>	IPROD		Appliances	
<b>As of Date</b>	01/31/2002			
<b>Localization Country</b>	USA		United States	
<b>Requester</b>	SAMPLE			
<b>Role Type ID</b>				
<b>Company Name</b>	<input type="text"/>			
<b>Partner Relationship Type</b>	<input type="text"/>			
<b>*Market</b>	Global			
<b>Order Capture Unit</b>	APP01			
<b>Mobile Customer Options</b>	<input type="text"/>			
<b>PIM Preference ID</b>	<input type="text"/>			
<input type="checkbox"/> <b>Alternate Character Enabled</b>				
<input type="checkbox"/> <b>Wealth Management</b>				

Example of the Overall Preferences page

If no business unit is defined on the Overall Preferences page, the default business unit is determined using the Default Business Unit flag, which is set on the Order Capture Business Unit definition page. To define or view Order Capture business units, access Setup CRM, Business Unit Related, Order Capture Definition:

Example of the Internal Business Unit page

You should confirm that your guest user is set up to meet your business needs.

### See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences”

---

## Understanding the Homepage URL

The URL of your Order Capture Self Service homepage depends on a number of factors. The URL components break down in this way:

```
http://<ServerName>/psp/<Site>/<portal>/<Node>/h/?tab=DEFAULT
```

<b>Server Name</b>	The name of the server. For example, www.mycompany.com.
<b>Site</b>	The name of the web server site name you defined when you installed PeopleSoft PeopleTools (the default value is ps).
<b>Node</b>	The local portal node.

For example, if you accepted all of the defaults when installing PeopleSoft Order Capture Self-Service, your URL would look similar to this:

```
http://www.servername.com/psp/ps/CUSTOMER/PSFT_CR/h/?tab=DEFAULT
```

---

## Task 4-1: Defining the Guest User

To define the guest user in the configuration.properties file:

1. Select PeopleTools, Web Profile, Web Profile Configuration.



2. Open the DEV profile definition.
3. Go to the Security tab and locate the Public Users group box.
4. Select the Allow Public Access option.
5. Enter *GUEST* for the User ID and Password.
6. Click Save:

Web Profile Configuration - Security page

## Task 4-2: Disabling the New Window URL

You should disable the New Window link provided by default on every PeopleSoft Pure Internet Architecture page. If present, it creates a potential security hole in your application.

To disable the New Window link, modify the web server configuration.properties file as follows:

1. Select PeopleTools, Web Profile, Web Profile Configuration.
2. Open the *DEV* profile definition.
3. Clear the Enable New Window option.
4. Click Save:



The image shows a web browser window with a tabbed interface. The 'General' tab is selected. The page contains several configuration fields and checkboxes. The 'Profile Name' is 'DEV', and the 'Description' is 'Installation Defaults'. The 'Authentication Domain' is '.peoplesoft.com'. The 'Help URL' is 'http://peoplebooks.peoplesoft.com/html/doc/crm88sp1/f1search.htm?ContextID=%C'. There are checkboxes for 'Compress Responses' (checked), 'Compress Response References' (unchecked), 'Compress Query' (checked), 'Enable Processing Message' (checked), 'Enable New Window' (unchecked), 'Enable PPM Agent' (checked), and 'Single Thread Netscape' (unchecked). There are also input fields for 'Save Confirmation Display Time' (3,000 Milliseconds), 'PPM Monitor Buffer Size' (51,200 KB), and 'Single Thread Delay' (1,000 Milliseconds). A 'Save As ...' button and a 'View History' link are also present.

Field	Value
Profile Name:	DEV
Description:	Installation Defaults
Authentication Domain:	.peoplesoft.com
Help URL:	http://peoplebooks.peoplesoft.com/html/doc/crm88sp1/f1search.htm?ContextID=%C
Compress Responses	<input checked="" type="checkbox"/>
Compress Response References	<input type="checkbox"/>
Compress Mime Types:	application/x-javascript,text/javascript,text/css,text/html
Compress Query	<input checked="" type="checkbox"/>
Save Confirmation Display Time:	3,000 Milliseconds
Enable Processing Message	<input checked="" type="checkbox"/>
Enable New Window	<input type="checkbox"/>
Enable PPM Agent	<input checked="" type="checkbox"/>
PPM Monitor Buffer Size:	51,200 KB
Single Thread Netscape	<input type="checkbox"/>
Single Thread Delay:	1,000 Milliseconds

Web Profile Configuration - General page

## CHAPTER 5

# Integrating Additional Software with PeopleSoft Enterprise Order Capture and PeopleSoft Enterprise Order Capture Self-Service

This chapter discusses:

- Integrating the PeopleSoft Freight Calculation
- Setting Up Business Interlink Architecture for Tax Integration
- Installing Taxware and Vertex Databases
- Setting Up Integration of Order Capture with Taxware WorldTax

---

**Note.** Before proceeding with your installation, check PeopleSoft Customer Connection to ensure that you have the latest version of the following documents: *PeopleSoft Enterprise CRM 9 Supplemental Installation Guide*, *Enterprise PeopleTools Installation guide* for your database platform, and *PeopleSoft PeopleTools 8.48 PeopleBook*.

---

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**Note.** In addition, you should consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on the PeopleSoft Customer Connection website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

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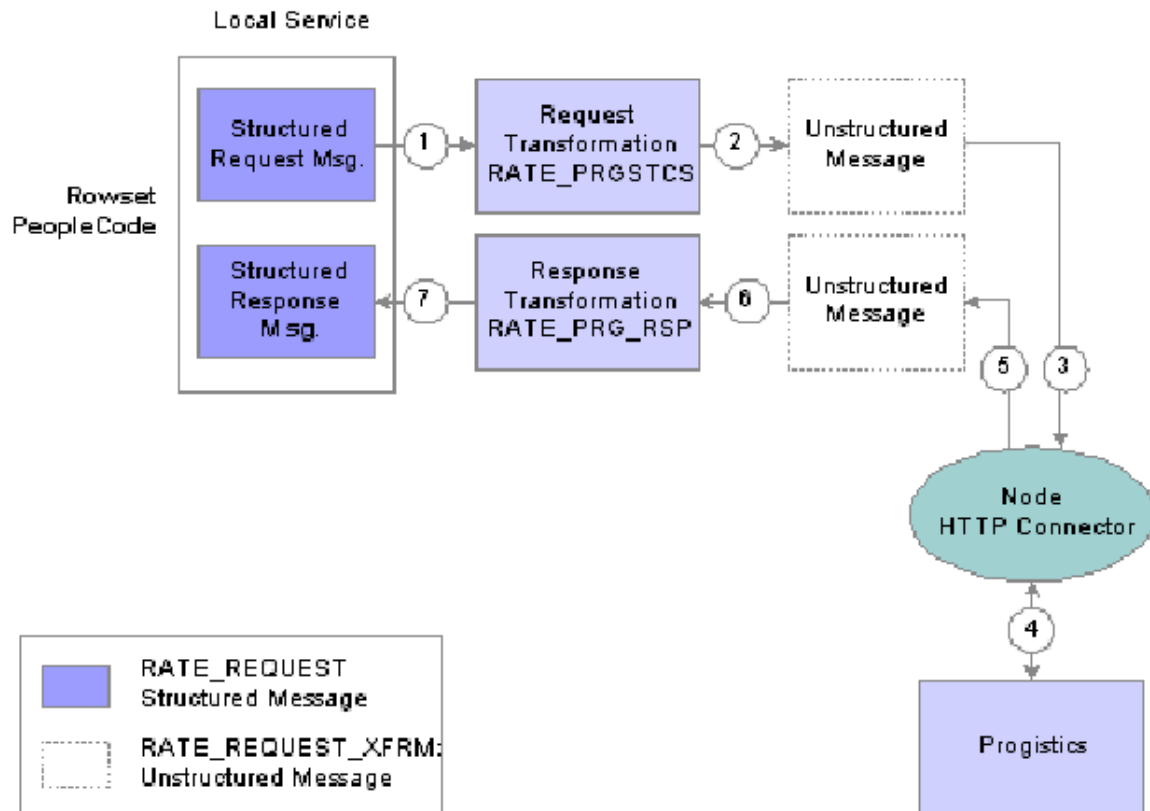
## Task 5-1: Integrating the PeopleSoft Freight Calculation

This section discusses:

- Understanding the PeopleSoft Freight Calculation Integration
- Setting Up the PeopleSoft Freight Calculation
- Testing the PeopleSoft Freight Calculation

### Understanding the PeopleSoft Freight Calculation Integration

Oracle's PeopleSoft products integrate to the Connectship Prologistics application for freight calculation. Application messaging is used to communicate to the Prologistics Freight Server. The following diagram illustrates the typical message flow between PeopleSoft products and the Connectship Prologistics application:



Message flow between PeopleSoft products and the Connectship Prologistics application

## Task 5-1-1: Setting Up the PeopleSoft Freight Calculation

To set up the PeopleSoft freight calculation:

1. Activate the RATE\_REQUEST service operation.

Navigate to PeopleTools, Integration Broker, Integration Setup, Service Operations and search for the RATE\_REQUEST service operation. On the Service Operation - General page, select the Active check box and save:

**General** | Handlers | Routings

**Service Operation:** RATE\_REQUEST

**Service:** RATE\_REQUEST

**Operation Type:** Synchronous

**\*Operation Description:** Freight Calc Rate Request ☐ **User/Password Required**

**Operation Comments:**

**Object Owner ID:** Order Capture Internal

**Operation Alias:**  [Service Operation Security](#)

**Default Service Operation Version**

**\*Version:** VERSION\_1 ☒ **Default** ☒ **Active**

**Version Description:** Freight Calc Rate Request

**Version Comments:**

☐ **Non-Repudiation**

☐ **Runtime Schema Validation**

[Introspection](#)

[Add Fault Type](#)

**Routing Status**

**Any-to-Local:** Does not exist

**Local-to-Local:** Does not exist

**Routing Actions Upon Save**

☐ **Generate Any-to-Local**

☐ **Generate Local-to-Local**

**Message Information**

**Type:** Request

**Message.Version:** RATE\_REQUEST.VERSION\_1 [View Message](#)

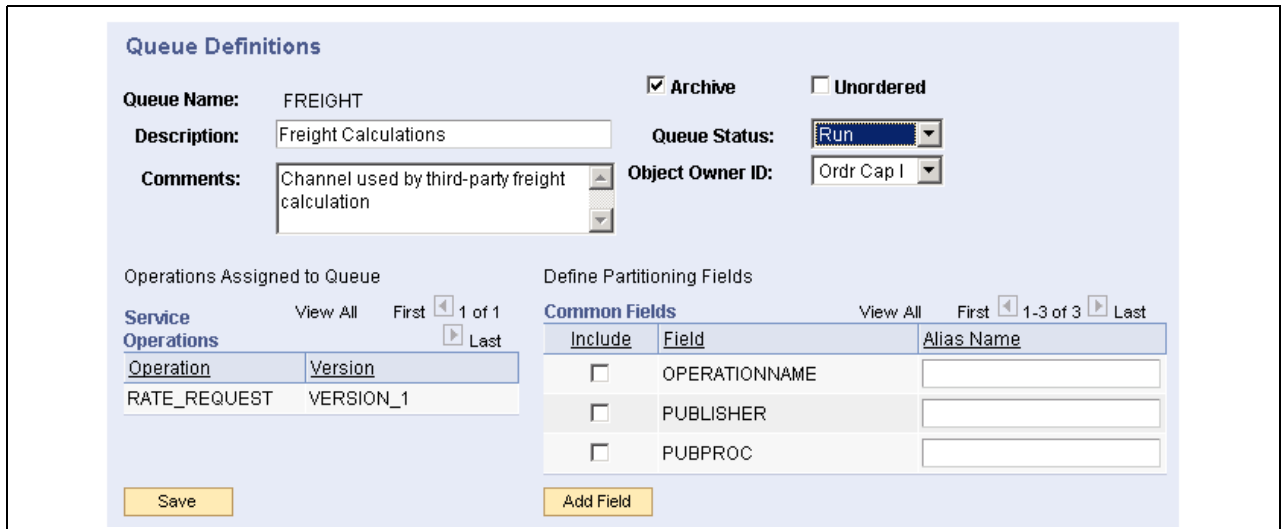
**Type:** Response

**Message.Version:** RATE\_RESPONSE.VERSION\_1 [View Message](#)

Service Operation - General page

2. Set the FREIGHT queue to run.

Navigate to PeopleTools, Integration Broker, Integration Setup, Queues and search for the queue name FREIGHT. On the Queue Definitions page, set Queue Status to *Run* and save:



**Queue Definitions**

**Queue Name:** FREIGHT ☒ Archive ☐ Unordered

**Description:** Freight Calculations **Queue Status:** Run

**Comments:** Channel used by third-party freight calculation **Object Owner ID:** Ordr Cap I

Operations Assigned to Queue Define Partitioning Fields

**Service Operations** View All First 1 of 1 Last

Operation	Version
RATE_REQUEST	VERSION_1

**Common Fields** View All First 1-3 of 3 Last

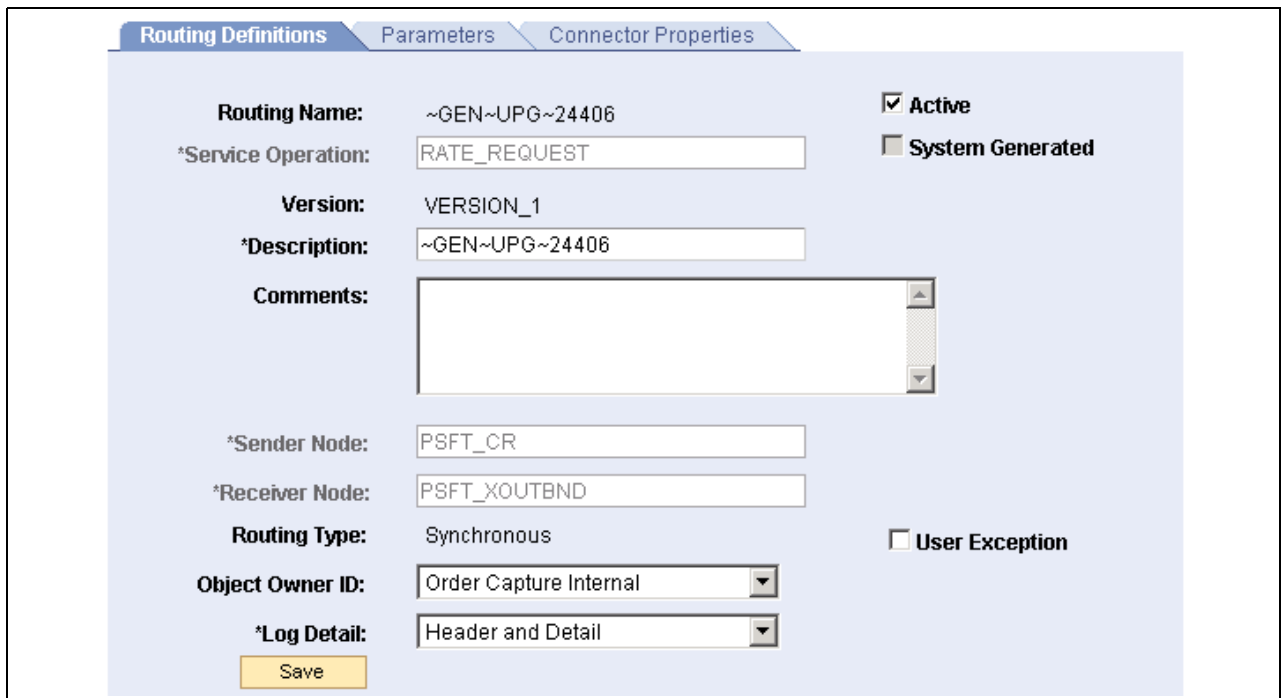
Include	Field	Alias Name
<input type="checkbox"/>	OPERATIONNAME	
<input type="checkbox"/>	PUBLISHER	
<input type="checkbox"/>	PUBPROC	

**Save** **Add Field**

Queue Definitions page

### 3. Activate the RATE\_REQUEST routing.

Navigate to PeopleTools, Integration Broker, Integration Setup, Routings and enter RATE\_REQUEST in the Service Operation search field. On the Routing Definitions page, select the Active check box. Optionally, set the Log Detail field to *Header and Details* to facilitate troubleshooting of the freight calculation setup:



**Routing Definitions** Parameters Connector Properties

**Routing Name:** ~GEN~UPG~24406 ☒ Active

**\*Service Operation:** RATE\_REQUEST ☐ System Generated

**Version:** VERSION\_1

**\*Description:** ~GEN~UPG~24406

**Comments:**

**\*Sender Node:** PSFT\_CR

**\*Receiver Node:** PSFT\_XOUTBND

**Routing Type:** Synchronous ☐ User Exception

**Object Owner ID:** Order Capture Internal

**\*Log Detail:** Header and Detail

**Save**

Routing Definitions page

### 4. Set up the connector properties for the freight server.

Go the Connector Properties page and enter rows with the following field values:

Property ID	Property Name	Value
Header	Content-Type	text/xml
HTTPPROPERTY	Method	POST
PRIMARYURL	URL	<p>ENTER the URL for the freight server.</p> <p><b>Note.</b> The URL format will be similar to <code>http://&lt;machine&gt;/Prologistics/XML_Processor/Server/XMLProcDLL.asp</code>. If you are not using port 80 on the prologistics server, indicate the port in this url, for example, <code>&lt;machine&gt;:8080</code>.</p>

Routing Definitions Parameters **Connector Properties**

Routing Name: ~GEN~UPG~24406

Service Operation: RATE\_REQUEST

Service Operation Version: VERSION\_1

Gateway ID: LOCAL

Connector ID: HTTPTARGET

Connector Properties Customize Find View All First 1-3 of 3 Last

Property ID	Property Name	Value
HEADER	Content-Type	text/xml
HTTPPROPERTY	Method	POST
PRIMARYURL	URL	http://ple-gscott:8080/Prologistics/XML

Save

Connector Properties page

## Task 5-1-2: Testing the PeopleSoft Freight Calculation

To test PeopleSoft Freight Calculations:

**Note.** This test uses UPS Ground as the carrier (TANDATA-UPS.UPS.GND). If you have not configured UPS Ground in Prologistics for your business unit, the test will not be able to calculate a freight amount.

1. Select Setup CRM, Business Unit Related, Order Capture Definition to open the Prologistics Business Unit definition set up within PeopleSoft CRM:

**Internal** **Self Service**

**Business Unit** US001  
 \*Description New York Operations  
 \*Short Description US001  
 \*Status Open  
☒ Default Business Unit  
☐ Submit Confirmation  
☐ Show Communications Tab

**Business Unit**

FieldService US200  
 Order Management US001  
 Contracts  
 Marketing US001  
 Proposal Management  
 General Ledger

**Tax Settings**

\*Tax Vendor None [Test Tax Interlink](#)  
 Order Origin New Jersey Operations  
 Order Acceptance California Location  
 Company PSFT  
 Division  
 Store Location

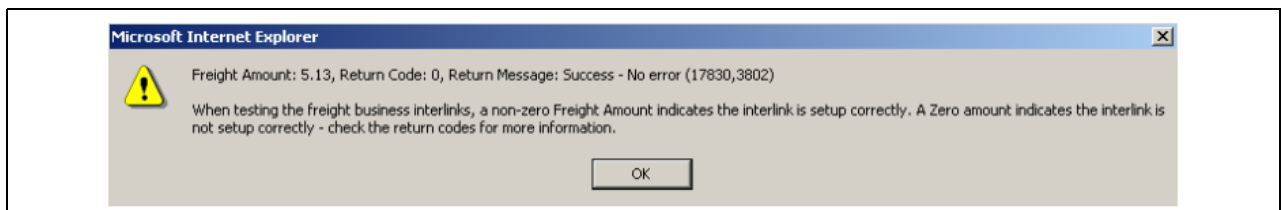
**Order Capture**

\*Freight Vendor None [Test Freight](#)  
 Ship From Connecticut Operations  
 Preferred Carrier  
 Quote Conversion Warning No Warning  
 \*Site Address Includes Customer Bill To Addresses  
 \*Card Vendor None  
 Source Phone  
 Capture Priority Medium  
 Base Currency US Dollar  
 Rate Type Average

Order Capture Definition - Internal page (partial)

- Click the Test Freight link.

You receive a message box with the results of your test:



Freight Amount success message

If the Freight Amount returned is not zero, you are set up correctly.

- Troubleshoot setup issues.

If a zero freight amount is returned, check the Return Code and Return Message for help in determining what is incorrectly set up. If you enabled Header and Details logging on the Routing Definitions page, you can also examine the synchronous message sent to Prologistics during this test. To view the synchronous message details, navigate to PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Synchronous Details.

## Task 5-2: Setting Up Business Interlink Architecture for Tax Integration

This section discusses:

- Understanding Business Interlink Architecture for Tax Integration
- Selecting Vendor Plug-in Locations



- Editing the Application Server Configuration File
- Selecting Vendor DLLs and Shared Library Locations

## Understanding Business Interlink Architecture for Tax Integration

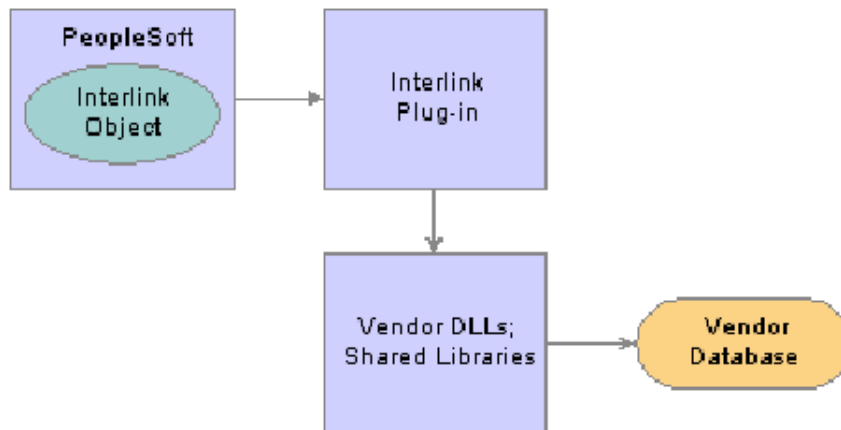
PeopleSoft Enterprise Order Capture delivers two business interlink objects to interact with Vertex and Taxware for both online and batch transactions: VERTEX\_CALCTAX and TAXWARE\_CALCTAX.

All interlink objects must point to an interlink plug-in in order to function. As part of each interlink object setup, the parameter URL points at the interlink plug-in used to process transactions. For Vertex and Taxware, this is set to point by default at the Windows dynamic link library delivered to PeopleSoft Customer Relationship Management (CRM) customers by each tax vendor. For Vertex, this object points to file://psbivrtx.dll. For Taxware, the object points to file://pstxwint.dll.

When running in a UNIX environment, the interlink architecture converts the name from a DLL to a UNIX shared library/shared object. This conversion occurs even though the interlink object definition points to a Windows DLL. The interlink architecture adds the prefix *lib* to the name, and then it adds the appropriate extension for each particular UNIX platform to replace the DLL extension.

For example, the interlink architecture changes the Windows DLL file, psbivrtx.dll, to libpsbivrtx.sl before each call to the interlink plug-in.

This diagram illustrates the interlink architecture flow:



Interlink Architecture flow

In the Interlink Architecture Flow diagram, the PeopleSoft box can represent a two-tier client (now only used to run the Application Designer), the application server, or the Process Scheduler server.

You can only do two-tier testing on a Windows client running the Application Designer. Use the Application Designer to open the interlink object definition and run the Interlink Tester.

The setup instructions described in the following sections should be performed on each computer to be used as an application server.

## Selecting Vendor Plug-in Locations

By default, PeopleSoft CRM looks for the interlink plug-in the following directories:

Location	Mode
<PS_HOME>\bin\client\winx86\Interface Drivers	For two-tier testing
<PS_HOME>\bin\server\<OS>\Interface Drivers where OS is the operating system of your server	For the application server

These directories contain the XML script files that describe the interlink plug-in structure. The directories are also used to create the delivered interlink objects in PeopleSoft Enterprise CRM. The XML script files have the same name as the windows DLL plug-in except that the file extension XML is used instead of the DLL file extension.

When you purchase the Vertex or Taxware software, each vendor will provide the appropriate interlink plug-in that you must place in these directories. Although the copy under <PS\_HOME>\bin\client\winx86\InterfaceDrivers is not used in production, you can use this copy when testing initial connectivity in two-tier mode by way of the interlink tester. The application server uses the plug-in copy in <PS\_HOME>\bin\server\<OS>\InterfaceDrivers.

For two-tier testing, you can change the default interlink plug-in directory location in the Configuration Manager.

## Editing the Application Server Configuration File

The application server configuration file has the following entry. You can use it to change the plug-in default location:

```
[ PSTOOLS ]
=====
; General settings for PSTOOLS
=====
; Uncomment this to specify an alternate directory to search for Interface Drivers.
; Business Interlink Driver Directory=
```

**Note.** If you will be using the Bulk Order feature of Order Capture, your Process Scheduler will be calculating the taxes for child orders. You will need to perform the same plug-in configuration on your process scheduler as you do for the Application Server.

## Task 5-2-1: Selecting Vendor DLLs and Shared Library Locations

Vendor-supplied DLLs or shared libraries can be placed in the following locations for each respective operating system:

### *Windows*

Typically, the vendor DLLs should be placed in the same directory as the PeopleSoft CRM main executable file:

Location	Mode
<PS_HOME>\bin\client\winx86	For two-tier testing
<PS_HOME>\bin\server\winx86	For the application server and Process Scheduler server

Vendor DLLs can also be placed in any directory that is in the PATH environment variable, which is accessible from the application server and the Process Scheduler server. This is also true when setting up a distributed interlink architecture.

#### *UNIX*

Typically, the vendor libraries should be placed in the same directory with the other PeopleSoft libraries. This directory is usually one of the directories pointed to by the LIBPATH environment variable that is set up in the psconfig.sh UNIX shell script: <PS\_HOME>/bin.

---

**Note.** If the system cannot find the plug-in DLL/shared library or vendor supplied DLL/shared library, an error appears.

---

## Task 5-3: Installing Taxware and Vertex Databases

This section discusses:

- Understanding the Taxware and Vertex Installation
- Installing Taxware
- Installing Vertex

### Understanding the Taxware and Vertex Installation

Both Vertex and Taxware provide installation instructions for their products for different operating systems and database formats. These instructions can be as simple as creating ISAM files or as complex as creating and populating relational database tables. Check with your vendor contact for supported operating system platforms and database types, and installation instructions.

---

**Note.** Once you have installed the vendor software, you should test the software independent of the PeopleSoft CRM environment. Each tax vendor provides utilities for testing its software in this way. You must also provide a way for the vendor DLLs/shared libraries to find the location of the vendor database.

---

### Task 5-3-1: Installing Taxware

#### *Windows:*

Taxware provides three INI files that you need to set up to point to the location of the Taxware database directories: AVPTAX.INI, AVPSTEP.INI, AVPZIP.INI. Place all three in the WINNT directory. Each file contains a set of pointer variables that you should point to the location where the Taxware database files were placed during Taxware software installation.

#### *UNIX:*

You must set up several environment variables in the psconfig.sh script of the PeopleSoft user who starts the application server and the Process Scheduler server. Define these variables and make them available to both the application server process and the Process Scheduler process. Directories should correspond to the location where you placed the Taxware database files during Taxware software installation.

### Task 5-3-2: Installing Vertex

#### *Windows:*

Vertex provides a registry file to populate entries in the Windows registry.

UNIX:

Vertex provides a configuration file called PSVTXCFG that contains entries similar to the ones in an NT registry. This file must be accessible to the vendor-supplied Shared libraries. Place this file in the same location as the shared libraries <PS\_HOME>/lib. You can also place this file in any directory as long as an environment variable called PSVTXCFG is defined in psconfig.sh and is set to point to the location of the configuration file. The psconfig.sh file must be for the PeopleSoft CRM user on the UNIX box that starts the application server and the Process Scheduler server. Define the variable for both the application server process and the Process Scheduler process so that the Vertex software can use it.

---

**Note.** For detailed information about business interlink technology, see *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Business Interlink*, Business Interlinks for Application Developers.

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## Task 5-4: Setting Up Integration of Order Capture with Taxware WorldTax

This section discusses:

- Understanding the Taxware WorldTax Integration
- Integrating Order Capture with Taxware
- Testing the Integration

### Understanding the Taxware WorldTax Integration

PeopleSoft Enterprise Order Capture integrates with Taxware WorldTax to calculate value-added tax (VAT). This integration uses the PeopleSoft Business Interlink technology.

PeopleSoft Enterprise Order Capture makes a synchronous, XML-based call containing the order information (such as products, customers, pricing, and so on) to WorldTax, which then calculates the appropriate VAT amount and returns it to CRM. These VAT amounts appear on the order.

---

**Note.** For detailed information about business interlink technology, see *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Business Interlink*, Business Interlinks for Application Developers.

---

### Task 5-4-1: Integrating Order Capture with Taxware

To integrate PeopleSoft Enterprise Order Capture with Taxware WorldTax:

1. Verify that Taxware WorldTax, System 2.5, is installed and operating correctly.  
For information, see the UTL2-1-2.pdf on the WorldTax CD for installation instructions.
2. Verify that the Sun Microsystems Java environment is installed and running on your application server.

---

**Note.** For more information, see *PeopleTools 8.48 PeopleBook: PeopleSoft Business Interlinks*, “Setting Up A Business Interlink Runtime Plug-In,” Setting up the Development Environment in Java.

---

3. Ensure psinterlinks.jar is referenced in the CLASSPATH.

See *PeopleTools PeopleBook: PeopleSoft Business Interlink Runtime Plug-in Programming Guide*, “Setting Up A Business Interlink Runtime Plug-In.”

4. Copy `taxcommon.class` from Taxware's WorldTax system, which you have installed in your environment, to your `<PS_HOME>\class` directory.

For more information, see the UTL2-1-2.pdf on the WorldTax CD for installation instructions.

5. Extract `crm_psoci_worldtax.class` from the clear case of your installation and copy it to your `<PS_HOME>\class` directory.

This is the java class file developed by PeopleSoft to integrate with the Taxware Worldtax system. Copy `crm_psoci_worldtax.xml` to the following two directories:

- `<PS_HOME>\bin\client\winx86\interfacedrivers`
- `PS_HOME>\bin\server\winx86\interfacedrivers`

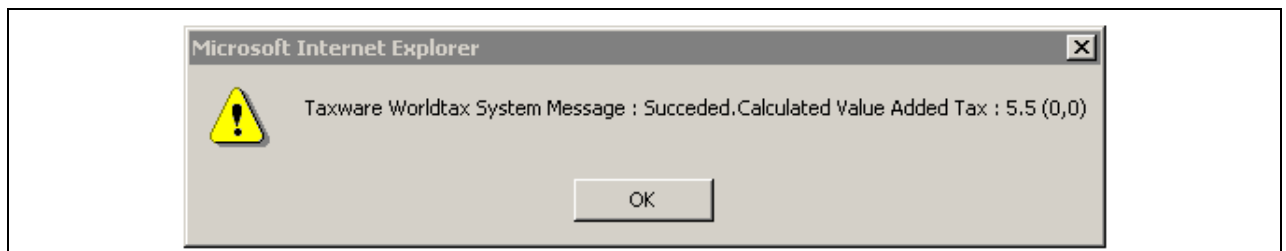
6. Configure the business interlink as a WebApp on WebSphere.

See *PeopleTools PeopleBook: PeopleSoft Business Interlink Runtime Plug-in Programming Guide*, "Configuring PSINTERLINKS as a WebApp on WebSphere."

## Task 5-4-2: Testing the Integration

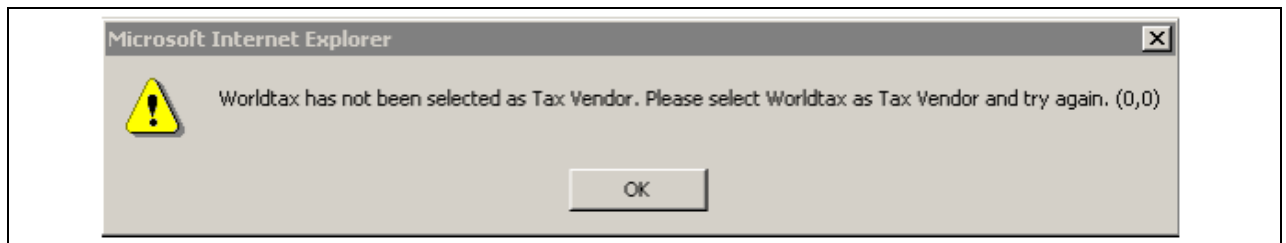
After integrating Order Capture with Taxware as described in the previous section, use these steps to test the business interlink:

1. From the PeopleSoft Enterprise CRM menu, select Set Up CRM, Business Unit Related, Order Capture Definition.
2. Select *WorldTax* from the Tax Vendor drop-down list box. Then, click the Test WorldTax Interlink button. If the environment is set up correctly, you receive the following message:



Taxware Worldtax success message

3. If you do not select *WorldTax* from the Tax Vendor drop-down list box and click the Test Worldtax Interlink button, you receive the following message:



Worldtax system error message



## CHAPTER 6

# Setting Up Integration Between PeopleSoft Enterprise CRM 9 and HRMS 8.8 SP1 or HRMS 8.9 for the HRHD Worker 360-Degree View

This chapter discusses:

- Prerequisites
- Setting Up the URL Gateway for CRM and HRMS
- Setting Up a Connector ID for PeopleSoft Enterprise CRM and HRMS Nodes
- Setting Up Single Signon
- Pinging the PeopleSoft Enterprise CRM and HRMS Nodes
- Activating the Message Channel or Queue
- Activating the HR\_HELPDESK\_360 EIP Messages
- Activating Transactions for the PSFT\_CR Node in PeopleSoft HRMS 8.8
- Activating Transactions for the PSFT\_CR Node in PeopleSoft HRMS 8.9
- Setting Up Portal Content Links
- Activating the Link Category Definition in CRM (for integrations with HCM 8.8)

---

**Note.** For information on setting up the integration between PeopleSoft CRM 9 and HRMS 8.3 SP1 and HRMS 8 SP1, see the following chapter.

Before proceeding with your installation, check PeopleSoft Customer Connection to ensure that you have the latest version of the following documents: PeopleSoft Enterprise PeopleTools Installation guide for your database platform for both Customer Relationship Management (CRM) and Human Resources Management System (HRMS) applications.

In addition, you should consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on the PeopleSoft Customer Connection website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

---

## Prerequisites

This chapter provides instructions for setting up the 360-Degree View Enterprise Integration Point (EIP). This EIP enables access to the PeopleSoft Enterprise HelpDesk for Human Resources 8.9 (HRHD) or HRHD 8.8 SP1 Worker 360-Degree View from PeopleSoft Enterprise CRM 9.

Before you perform the tasks in this chapter, you must have installed and configured a PeopleSoft Enterprise CRM 9 database and an HRMS 8.8 SP1 or HRMS 8.9 database.

## Task 6-1: Setting Up the URL Gateway for CRM and HRMS

A URL gateway must be set up in the PeopleSoft Enterprise CRM and HRMS systems. In addition, PSFT\_CR is delivered as a local node on PeopleSoft Enterprise CRM, and PSFT\_HR is delivered as a local node on PeopleSoft Enterprise HRMS. The gateway URL defines these two nodes in a gateway property file. In HRMS, you must create a gateway for the CRM database.

**Note.** It is not mandatory that you use the delivered PSFT\_CR and PSFT\_HR nodes. You can define any local node as a URL gateway. If you do use another node instead of PSFT\_CR and PSFT\_HR nodes, please substitute the nodes you selected for PSFT\_CR and PSFT\_HR in the directions that follow.

See *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*, “Managing Integration Gateways.”

The following table gives the location of the gateway property file for various configurations:

PeopleSoft Enterprise Product Application	Application Server	Gateway URL Directory
CRM	Oracle Application Server	\$ORACLE_HOME/j2ee /<component_name>/applications /<application_name>/PSIGW/WEB-INF
CRM	WebLogic	<%PS_HOME%>\webserver \peoplesoft\applications \peoplesoft\PSIGW\WEB-INF \IntegrationGateway.Properties
CRM	WebSphere	<%PS_HOME%>\webserver \<cellname_nodename_servername> \<domain.ear>\PSIGW\WEB-INF \IntegrationGateway.Properties
HRMS 8.8 SP1 and HRMS 8.9 on PeopleTools releases prior to 8.47	WebLogic	C:\bea\wlserver61\config\PeopleSoft \Applications\PSIGW\Web-Inf \IntegrationGateway.Properties
HRMS 8.8 SP1 and HRMS 8.9 on PeopleTools 8.47 and later	WebLogic	<%PS_HOME%>\webserver \peoplesoft\applications \peoplesoft\PSIGW\WEB-INF \IntegrationGateway.Properties
HRMS 8.8 SP1 and HRMS 8.9	WebSphere	C:\WebSphere\AppServer \installedApps\peoplesoft \PSIGW\WEB-INF \IntegrationGateway.Properties
HRMS 8.8 SP1 and HRMS 8.9	Oracle Application Server	\$ORACLE_HOME/j2ee /<component_name>/applications /<application_name>/PSIGW/WEB-INF

Here is an example of a properties file with two nodes defined. You need to modify the files on both the CRM and HRMS systems to have two nodes defined with the following information:



```
#
# Replace $NODENAME with the exact name used for that Node.
# Replace information shown in <> with the correct information for your Node =>
# (remove the <> as well)
#
# If a Non-Default Node is required the following settings should be uncommented.
#
ig.isc.PSFT_HR.serverURL=//adntas72:9350
ig.isc.PSFT_HR.userid=PS
ig.isc.PSFT_HR.password=8T+SA8zGqEM=
ig.isc.PSFT_HR.toolsRel=8.42-MC3

ig.isc.PSFT_CR.serverURL=//adntas41:8050
ig.isc.PSFT_CR.userid=VP1
ig.isc.PSFT_CR.password=JekncVtPdNg=
ig.isc.PSFT_CR.toolsRel=8.45
```

The passwords in the property file must be encrypted using PSCipher. For it to run on Microsoft Windows, make sure *Java* is in your system environment path.

---

**Note.** Run PSCipher.bat on each PeopleTools installation location. For the WebSphere web server *only*: Run the setupcmdline.bat before executing PSCipher.bat to ensure that Java is set properly. To identify the PeopleTools release (toolsRel), see the PSSTATUS record.

---

- For PeopleSoft Enterprise CRM 9 on a WebLogic web server, find the PSCipher.bat under:  
`<%PS_HOME%>\webserver\peoplesoft\PSCipher.bat`
- For PeopleSoft Enterprise CRM 9 on an Oracle application server, find the PSCipher.bat under:  
`<Oracle home>\j2ee\peoplesoft\applications\peoplesoft\PSCipher.bat`
- For PeopleSoft Enterprise CRM 9 on a WebSphere web server, find PSCipher.bat under:  
`<%PS_HOME%>\webserver\<cellname_nodename_servername>\<domain.ear>\PSCipher.bat`
- For PeopleSoft Enterprise HRMS 8.8 SP1 and HRMS 8.9 on a WebLogic web server, the command is located at the WebLogic home directory under config\peoplesoft.

The command will return the encrypted password when you enter an original password. Copy and paste the encrypted password into the gateways properties file. In this example, the encrypted password is shown in bold font:

```
C:\bea\wlserver6.1\config\peoplesoft>PSCipher COMPACT
8T+SA8zGqEM=
```

- For PeopleSoft Enterprise HRMS 8.8 SP1 and HRMS 8.9 with WebSphere, the location of the command is:  
`C:\websphere\appserver\installedapps\peoplesoft\`

---

**Note.** The PSCipher password-encryption utilities will generate different passwords depending on the tools version. PeopleSoft Enterprise CRM 9 uses the PSCipher delivered by PeopleTools 8.48, and PeopleSoft HRMS uses the one delivered by its tools release. Ensure that you have the correct version. Otherwise, when you complete the following task, Activating the Message Channel, you will receive this error: *unable to decrypt password*. Encrypt the PSFT\_CR password using PeopleTools in the CRM database; encrypt the PSFT\_HR password using PeopleTools on the HRMS database.

---

In addition to editing the IntegrationGateway.Properties file, you must use Integration Broker to specify the gateway URL on both the CRM and HRMS systems. To set up the URL for the CRM system:

1. In the CRM system, select PeopleTools, Integration Broker, Configuration, Gateways to access the Gateways page.

2. Search for and select *LOCAL* gateway.

The Gateways page appears.

3. Enter the Gateway URL on the Gateways page:

`http://<webserver_machine_name><port>/PSIGW/PeopleSoftListeningConnector`

The value that you enter for <webserver\_machine\_name><port> depends on the machine you set up to access the integration gateway properties file that has been edited as described above to define two nodes. The <port> value should be an HTTP port.

4. Click Save. Click OK for the “No Connectors detected” dialog box.

5. Click the Load Gateway Connector button.

You will get this message: “Gateway refresh process was successful.”

6. Click OK.

7. Click Save.

To set up the gateway in the HRMS system:

1. In the HRMS system, select PeopleTools, Integration Broker, Configuration, Gateways to access the Gateways page.

2. Search for and select *LOCAL* gateway.

The Gateways page appears:

**Gateways**

Gateway ID: LOCAL

☒ Local Gateway ☐ Load Balancer

URL:

[Gateway Setup Properties](#)

**Connectors**

*Connector ID	Description	*Connector Class Name	
1 AS2TARGET		AS2TargetConnector	Properties + -
2 FILEOUTPUT		SimpleFileTargetConnector	Properties + -
3 FTPTARGET		FTPTargetConnector	Properties + -
4 GETMAILTARGET		GetMailTargetConnector	Properties + -
5 HTTPTARGET		HttpTargetConnector	Properties + -
6 JMSTARGET		JMSTargetConnector	Properties + -
7 LDAPTARGET		LDAPTargetConnector	Properties + -
8 PSFT81TARGET		ApplicationMessagingTargetConnector	Properties + -
9 PSFTTARGET		PeopleSoftTargetConnector	Properties + -
10 SMTPTARGET		SMTPTargetConnector	Properties + -

Gateways page

- Enter the Gateway URL on the Gateways page:

`http://<webserver_machine_name><port>/PSIGW/PeopleSoftListeningConnector.`

The value that you enter for `<webserver_machine_name><port>` depends on the machine you set up to access the integration gateway properties file that has been edited as described above to define two nodes. The `<port>` value should be an HTTP port.

- Click Save.
- Click the Load Gateway Connector button.

You will get this message: "Gateway refresh process was successful."

- Click OK.
- Click Save.

To set up the new gateway for CRM in the HRMS system:

- In the HRMS system, select PeopleTools, Integration Broker, Configuration, Gateways to access the Gateways page.
- On the Add page, add a new gateway called CRM.

The Gateways page appears.

- Enter the Gateway URL on the Gateways page:

`http://<webserver_machine_name><port>/PSIGW/PeopleSoftListeningConnector.`

The value that you enter for `<webserver_machine_name><port>` depends on the machine you set up to access the integration gateway properties file that has been edited as described above to define two nodes. The `<port>` value should be an HTTP port. Use the URL defined when setting up the gateway in the CRM system.

- Click Save.

5. Click the Load Gateway Connector button.  
You will get this message: “Gateway refresh process was successful.”
6. Click OK.
7. Click Save.

### See Also

*Enterprise PeopleTools 8.48 PeopleBook: Integration Broker, “Managing Integration Gateways”*

---

## Task 6-2: Setting Up a Connector ID for PeopleSoft Enterprise CRM and HRMS Nodes

This section discusses:

- Defining a Connector ID for the PeopleSoft Enterprise CRM Nodes in the CRM System
- Defining a Connector ID for the PeopleSoft Enterprise HRMS Nodes in the HRMS System

### Task 6-2-1: Defining a Connector ID for the PeopleSoft Enterprise CRM Nodes in the CRM System

You must set up a connector ID as PSFTTARGET for the PSFT\_CR and PSFT\_HR nodes in the PeopleSoft Enterprise CRM system.

To define a PSFTTARGET Connector ID for the PeopleSoft Enterprise CRM nodes:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes in the PeopleSoft Enterprise CRM system.
2. Specify the PSFT\_CR node (local node).
3. In the Node Definitions component, select the Connectors tab:

The screenshot shows the 'Node Definitions' component with the 'Connectors' tab selected. The 'Node Name' is 'PSFT\_CR'. Below the 'Details' section, the 'Gateway ID' is 'LOCAL' and the 'Connector ID' is 'PSFTTARGET'. A message states: 'This connector does not have properties. Use Gateways Page to setup.' There are buttons for 'Save', 'Return to Search', and 'Ping Node'. A link for 'Gateway Setup Properties' is also visible.

Node Definitions - Connectors page

4. On the Connectors page, enter *PSFTTARGET* in the Connector ID field.
5. Click Save.
6. Repeat the procedure for the PSFT\_HR node (remote node):

The screenshot shows the 'Node Definitions - Connectors' page for the 'PSFT\_HR' node. The 'Node Name' is 'PSFT\_HR'. The 'Gateway ID' is 'LOCAL' and the 'Connector ID' is 'PSFTTARGET'. A message states: 'This connector does not have properties. Use Gateways Page to setup.' There are 'Save' and 'Return to Search' buttons at the bottom.

Node Definitions - Connectors page

## Task 6-2-2: Defining a Connector ID for the PeopleSoft Enterprise HRMS Nodes in the HRMS System

You must set up a connector ID as PSFTTARGET for the PSFT\_CR and PSFT\_HR nodes in the PeopleSoft Enterprise HRMS system.

To define a PSFTTARGET Connector ID for the PeopleSoft Enterprise CRM nodes:

1. Verify that a gateway has been created for accessing the CRM database.  
See Task 6-1: Setting Up the URL Gateway for CRM and HRMS.
2. Select PeopleTools, Integration Broker, Integration Setup, Node Definitions in the PeopleSoft Enterprise CRM system.
3. Specify the PSFT\_CR node (remote node).
4. In the Node Definitions component, select the Connectors tab:

The screenshot shows the 'Node Definitions - Connectors' page for the 'PSFT\_CR' node. The 'Node Name' is 'PSFT\_CR'. The 'Gateway ID' is '898B' and the 'Connector ID' is 'PSFTTARGET'. A message states: 'This connector does not have properties. Use Gateways Page to setup.' There are 'Save' and 'Return to Search' buttons at the bottom.

Node Definitions - Connectors page

5. On the Connectors page, enter the CRM gateway ID in the Gateway ID field .
6. On the Connectors page, enter *PSFTTARGET* in the Connector ID field.
7. Click Save.

To define a PSFTTARGET Connector ID for the PeopleSoft Enterprise HRMS nodes:

1. Verify that a gateway has been created for accessing the HRMS database (local gateway).

See Task 6-1: Setting Up the URL Gateway for CRM and HRMS.

2. Select PeopleTools, Integration Broker, Integration Setup, Node Definitions in the PeopleSoft Enterprise CRM system.
3. Specify the PSFT\_HR node (local node).
4. In the Node Definitions component, select the Connectors tab:

The screenshot displays the 'Node Definitions - Connectors' page. At the top, there are tabs for 'Node Definitions', 'Connectors', 'Portal', 'WS Security', and 'Routings'. The 'Connectors' tab is active. Below the tabs, the 'Node Name' is 'PSFT\_HR'. There is a 'Ping Node' button. Under the 'Details' section, the 'Gateway ID' is 'LOCAL' and the 'Connector ID' is 'PSFTTARGET'. A message box states: 'This connector does not have properties. Use Gateways Page to setup.' There are buttons for 'Save' and 'Return to Search'. At the bottom, there is a breadcrumb trail: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Node Definitions - Connectors page

5. On the Connectors page, enter *LOCAL* in the Gateway ID field .
6. On the Connectors page, enter *PSFTTARGET* in the Connector ID field.
7. Click Save.

## Task 6-3: Setting Up Single Signon

Integration machines should be set up to support single signon so that users do not need to sign on to PeopleSoft HRMS manually when transferring from PeopleSoft Enterprise CRM to HRMS. To do this, you must set a password authentication option for the PSFT\_CR node and define the same password for the node in both systems.

To set up the Authentication Option for the PSFT\_CR Node:

1. Select PeopleTools, Integration Broker, Integration Setup, Node Definitions in both PeopleSoft CRM and PeopleSoft HRMS.
2. Search for and open the PSFT\_CR node.
3. Select the Node Definitions tab.
4. Specify a password authentication option for PSFT\_CR node as follows:
  - On the Node Definitions page in the PeopleSoft Enterprise CRM system, set the Authentication Option for the PSFT\_CR node to *Password* and enter an appropriate password. Click the ENTER key or tab out of the Password field and enter the same password in the Confirm Password field.
  - On the Node Definitions page in the HRMS system, set the Authentication Option for the PSFT\_CR node to *Password* and enter the same password that you did in the PeopleSoft Enterprise CRM system. Click the ENTER key or tab out of the Password field and enter the same password in the Confirm Password field.
5. Click Save.

The screenshot displays the 'Node Definitions' page for a node named 'PSFT\_HR'. The page is organized into sections for node identification, configuration, and security. The 'Node Name' is 'PSFT\_HR' and the 'Description' is 'PS HRMS - Local Node'. The 'Node Type' is set to 'PIA' and the 'Routing Type' is 'Implicit'. The 'Authentication Option' is 'Password'. The 'Password' field is masked with dots. The 'Default User ID' is 'VP1'. There are also fields for 'Hub Node', 'Master Node', 'Company ID', 'IB Throttle Threshold', 'Image Name', and 'Code Set Group Name'. On the right side, there are checkboxes for 'Default Local Node', 'Local Node', 'Active Node' (which is checked), 'Non-Repudiation', and 'Segment Aware'. At the top right, there are buttons for 'Copy Node', 'Rename Node', and 'Delete Node'. At the bottom, there are links for 'Contact/Notes' and 'Properties'.

Node Definitions page

6. Identify the PSFT\_CR node as a trusted node for single signon in the PeopleSoft HRMS system as follows:
  - a. Select PeopleTools, Security, Security Objects, Single Signon to access the Single Signon page in PeopleSoft HRMS.
  - b. On the Single Sign On page, add the node PSFT\_CR to indicate that the node is trusted for single signon.
  - c. Click Save.
7. Verify that both the PeopleSoft Enterprise CRM and HRMS web servers are using the proper AuthTokenDomain. To add an AuthTokenDomain to either the CRM or HRMS web server:
  - a. Locate the configuration.properties file.

If the default paths were not selected during installation, the file will be located here:

\\<Webserver>\<PIA instance>\configuration.properties

The following table gives the location of the Configuration.Properties files:

PeopleSoft Enterprise Application	Web Server	Directory
HRMS on PeopleTools releases prior to 8.47	WebLogic version up to 6.1	C:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\WEB-INF\psftdocs\ps
HRMS on Peopletools releases prior to 8.47	Weblogic version post 6.1	<%PS_HOME%>\websevr\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps



PeopleSoft Enterprise Application	Web Server	Directory
HRMS on PeopleTools 8.47 and later	WebLogic version post 6.1	<%PS_HOME%>\web serv \peoplesoft\applications \peoplesoft\PORTAL\WEB- INF\psftdocs\ps
CRM	WebLogic version post 6.1	<%PS_HOME%>\web serv \peoplesoft\applications \peoplesoft\PORTAL\WEB- INF\psftdocs\ps
HRMS	WebSphere	C:\WebSphere\AppServer \installedApps\peoplesoft \PORTAL\WEB-INF\psftdocs\ps
CRM	WebSphere	<%PS_HOME%>\web serv \<cellname_nodename_ servername>\<domain.ear> \PORTAL\WEB-INF\psftdocs\ps
CRM	Oracle Application Server	\$OAS_HOME/j2ee/<sitename> /applications/<sitename> /PORTAL/WEB-INF/pftdocs /ps/configuration.properties
HRMS	Oracle Application Server	\$OAS_HOME/j2ee/<sitename> /applications/<sitename> /PORTAL/WEB-INF/pftdocs /ps/configuration.properties

If you are using WebLogic or WebSphere, verify that the configuration.properties and cookierules.xml files contain a valid AuthTokenDomain for both the PeopleSoft Enterprise CRM and HRMS web servers. Find cookierules.xml files in the following location:

<PS\_Home>\web serv\<domain name>\applications\PeopleSoft\Portal\web-inf\psftdocs\<sitename>\webproof

- b. Add the following parameter:

AuthTokenDomain = .<domain>.com

For example:

AuthTokenDomain = .peoplesoft.com

---

**Note.** Make sure you include a space in front of the first period (that is, after the “=” and before the domain). The space is required.

---

8. Reboot the PeopleSoft Enterprise CRM and HRMS web servers.



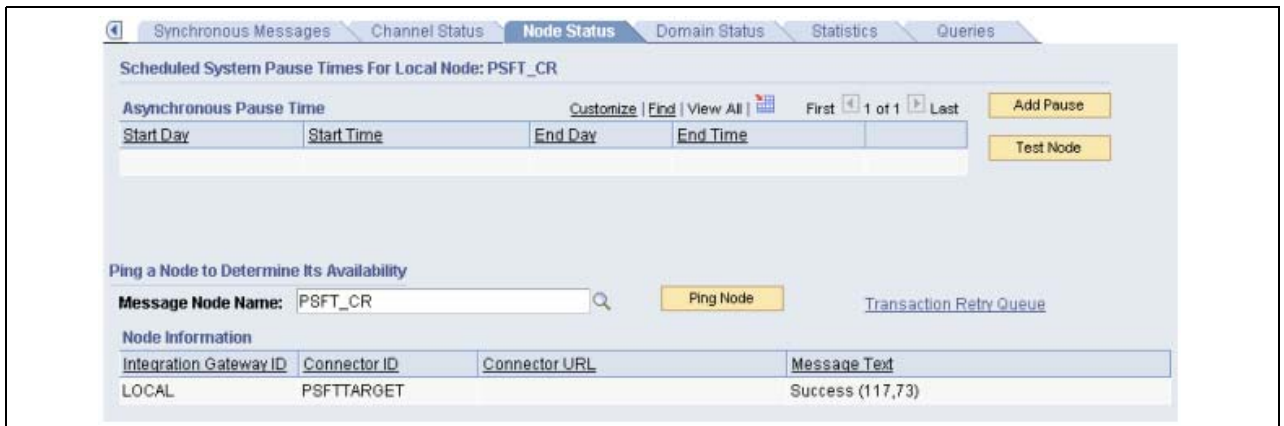
## Task 6-4: Pinging the PeopleSoft Enterprise CRM and HRMS Nodes

Ping the PSFT\_HR and PSFT\_CR nodes on both the PeopleSoft Enterprise CRM and HRMS systems to verify successful configuration.

To ping the PSFT\_HR and PSFT\_CR nodes:

1. Access the Node Status page in the Monitor Message component. If you are using PeopleTools 8.48, select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Node Status. If you are using a PeopleTools release previous to 8.48, select PeopleTools, Integration Broker, Monitor Integrations, Monitor Message.
2. Select the Node Status tab.
3. On the Node Status page, search and select the node name PSFT\_HR or PSFT\_CR.
4. Click the Ping Node button.

You will see Success in the message text. If you do not, you need to refer to the *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker* to debug.



Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

Node Status page

**Note.** You must follow all of the previous steps to get a successful ping.

## Task 6-5: Activating the Message Channel or Queue

This section discusses:

- Confirming that Channel HD\_360\_SETUP Is Running in the HRMS System
- Confirming That Queue HD\_360\_SETUP Is Running in the CRM System

### Task 6-5-1: Confirming that Channel HD\_360\_SETUP Is Running in the HRMS System

To confirm that channel HD\_360\_SETUP is running:

1. If you are using PeopleTools 8.48, select PeopleTools, Integration Broker, Service Operations Monitor, Administrator, Node Status. If you are using a PeopleTools release previous to 8.48, select PeopleTools, Integration Broker, Monitor Integrations, Monitor Message.
2. Confirm that channel HD\_360\_SETUP on the Channel Status tab is up and running.
3. The Run/Pause button is a toggle button.

If the status is *Paused*, click the Run button. The status changes to *Running*, and the button changes to Pause.

## Task 6-5-2: Confirming That Queue HD\_360\_SETUP Is Running in the CRM System

To confirm that queue HD\_360\_SETUP is running:

1. In the CRM system, select People Tools, Integration Broker, Integration Setup, Queues and search on Queue Name beginning with “HD\_360\_SETUP” to access the Queue Definitions page.
2. Confirm that Queue Status for HD\_360\_SETUP is set to *Run*. If the Queue Status is set to *Pause*, select *Run* from the Queue Status drop-down list box.
3. Save.

---

## Task 6-6: Activating the HR\_HELPDESK\_360 EIP Messages

### Understanding Message Activation for the HR\_HELPDESK\_360 EIP Messages

The 360-Degree View EIP includes two application messages, Name HD\_360\_REQUEST\_SYNC and HD\_360\_RESPONSE\_SYNC. These messages are inactive when shipped. You must activate these messages in both the PeopleSoft Enterprise CRM and HRMS systems.

### Task 6-6-1: Activating the 360-Degree View EIP Application Messages in HRMS

To activate the 360-Degree View EIP application messages in the HRMS system:

1. Sign on to Application Designer.
2. Select File, Open, and select *Message* from the Definition drop-down list box.

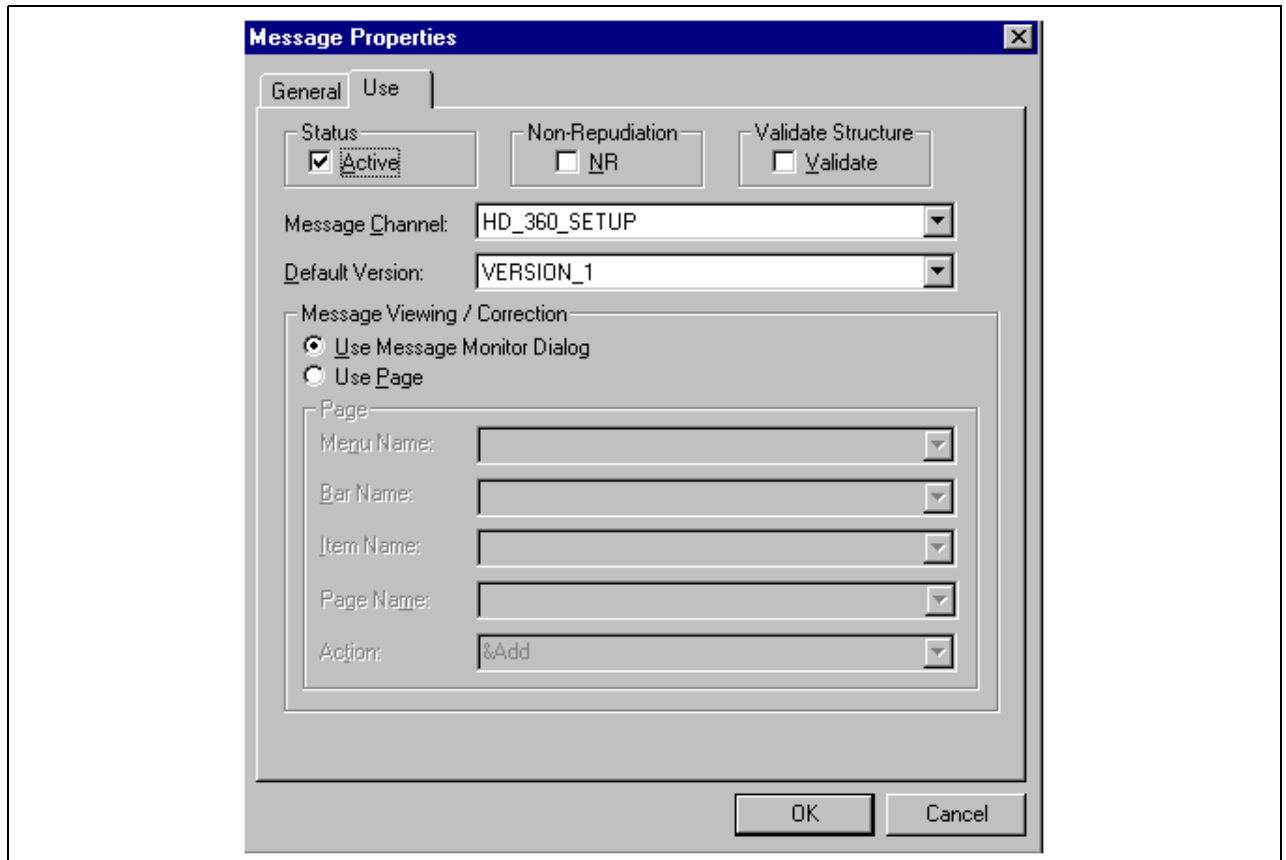
This selection enables you to find application message definitions.

To find the 360-Degree View EIP application message definitions, search for each of the following message names:

HD\_360\_REQUEST\_SYNC and HD\_360\_RESPONSE\_SYNC

For each message, open the message definition and perform the next two steps:

3. Right-click the message and select Message Properties.
4. On the Use tab of the Message Properties dialog box, select the Active Status check box and click OK:



Message Properties dialog box

5. Save the message definition.

## Task 6-6-2: Activating the 360-Degree View EIP Application Messages in CRM for CRM 9 and HRMS 8.9

To activate the 360-Degree View EIP application messages in the CRM system:

1. Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service HD\_360\_REQUEST\_SYNC.
2. Select HD\_360\_REQUEST\_SYNC.VERSION\_2 from the Existing Operations section to open the Operations page.

### Services

**Service:** HD\_360\_REQUEST\_SYNC  
**\*Description:** HR Helpdesk Request  
**Comments:** HR Helpdesk Request message. This request message is sent to HRMS application to get worker information.  
**Service Alias:**   
**Object Owner ID:** 360 Degree View  
**\*Namespace:** http://www.oracle.com/enterprise/crm  
[View WSDL](#)

### Service Operations

**Service Operation:**   
**Operation Type:**

### Existing Operations

[Customize](#) | [Find](#) | [View All](#) |  1 of 1

Operation	Message Links	Active	Operation Type
<a href="#">Operation.Default Version</a> <a href="#">HD_360_REQUEST_SYNC.VERSION_2</a>	<a href="#">Description</a> HR Helpdesk	<input type="checkbox"/>	Synch

Services page

- To activate HD\_360\_REQUEST\_SYNC.VERSION\_2 , select the Active check box under Default Service Operation Version for VERSION\_2 on the General tab, and click Save:

**General** | Handlers | Routings

**Service Operation:** HD\_360\_REQUEST\_SYNC  
**Service:** HD\_360\_REQUEST\_SYNC  
**Operation Type:** Synchronous

**\*Operation Description:** HR Helpdesk Message ☐ User/Password Required

**Operation Comments:**

**Object Owner ID:** 360 Degree View

**Operation Alias:**  [Service Operation Security](#)

**Default Service Operation Version**

**\*Version:** VERSION\_2 ☒ **Default** ☐ **Active**

**Version Description:** HR Helpdesk [Routing Status](#)

**Version Comments:**

☐ Non-Repudiation ☐ Runtime Schema Validation

[Intropection](#)

**Message Information**

**Type:** Request  
**Message.Version:** HD\_360\_REQUEST\_SYNC.VERSION\_2  [View Message](#)

**Type:** Response  
**Message.Version:** HD\_360\_RESPONSE\_SYNC.VERSION\_1  [View Message](#)

**Routing Status**

**Any-to-Local:** Does not exist  
**Local-to-Local:** Does not exist

**Routing Actions Upon Save**

☐ Generate Any-to-Local  
☐ Generate Local-to-Local

**Non-Default Versions** [Customize](#) | [Find](#) | [First](#) | [1 of 1](#) | [Last](#)

Version	Description	Active
VERSION_1	HR Helpdesk Message	<input type="checkbox"/>

[Return to Service](#) [Add Version](#)

General | Handlers | Routings

General page

4. To activate the routing for HD360\_VERSION\_2:
  - a. Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service HD\_360\_REQUEST\_SYNC.
  - b. Select HD\_360\_REQUEST\_SYNC.VERSION\_2 from the Existing Operations section to open the Operations page.
  - c. Go to the Routings tab and click HD360\_VERSION\_2:

Selected	Name	Version	Routing Type	Sender Node	Receiver Node	Direction	Status
<input type="checkbox"/>	-GEN-UPG-11870	VERSION_2	Synch	PSFT_CR	PSFT_HR	Outbound	Inactive
<input type="checkbox"/>	HD360_VERSION_1	VERSION_1	Synch	PSFT_CR	PSFT_HR	Outbound	Inactive
<input type="checkbox"/>	HD360_VERSION_2	VERSION_2	Synch	PSFT_CR	PSFT_HR	Outbound	Inactive

Routings page

- d. On the Routing Definitions page, select the active check box and click Save:

Routing Name: HD360\_VERSION\_2 ☒ Active

\*Service Operation: HD\_360\_REQUEST\_SYNC ☐ System Generated

Version: VERSION\_2

\*Description: HD360\_VERSION\_2

Comments:

\*Sender Node: PSFT\_CR

\*Receiver Node: PSFT\_HR

Routing Type: Synchronous ☐ User Exception

Object Owner ID: 360 Degree View

\*Log Detail: No Logging

Save Return

Routing Definitions page

### Task 6-6-3: Activating the 360-Degree View EIP Application Messages in CRM for CRM 9 and HRMS 8.8 SP1

To activate the 360-Degree View EIP application messages in the CRM system:

1. Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service HD\_360\_REQUEST\_SYNC.
2. For integrations between CRM 9 and HCM 8.8, activate service operation HD\_360\_REQUEST\_SYNC.VERSION\_2 and service operation HD\_360\_REQUEST\_SYNC.VERSION\_1.
3. To activate HD\_360\_REQUEST\_SYNC.VERSION\_2, select the Active check box under Default Service Operation Version for VERSION\_2 on the General page and click Save:

**General** | Handlers | Routings

**Service Operation:** HD\_360\_REQUEST\_SYNC  
**Service:** HD\_360\_REQUEST\_SYNC  
**Operation Type:** Synchronous

**\*Operation Description:** HR Helpdesk Message ☐ User/Password Required

**Operation Comments:**

**Object Owner ID:** 360 Degree View

**Operation Alias:**  [Service Operation Security](#)

**Default Service Operation Version**

**\*Version:** VERSION\_2 ☒ **Default** ☐ **Active**

**Version Description:** HR Helpdesk [Routing Status](#)

**Version Comments:**

☐ Non-Repudiation ☐ Runtime Schema Validation

[Intropection](#)

**Routing Status**

**Any-to-Local:** Does not exist  
**Local-to-Local:** Does not exist

**Routing Actions Upon Save**

☐ Generate Any-to-Local  
☐ Generate Local-to-Local

**Message Information**

**Type:** Request  
**Message.Version:** HD\_360\_REQUEST\_SYNC.VERSION\_1  [View Message](#)

**Type:** Response  
**Message.Version:** HD\_360\_RESPONSE\_SYNC.VERSION\_1  [View Message](#)

**Non-Default Versions** [Customize](#) | [Find](#) | [First](#) | 1 of 1 | [Last](#)

Version	Description	Active
VERSION_1	HR Helpdesk Message	<input type="checkbox"/>

[Return to Service](#) [Add Version](#)

[General](#) | [Handlers](#) | [Routings](#)

General page

4. To activate service operation HD\_360\_REQUEST\_SYNC.VERSION\_1, select VERSION\_1 under Non-Default Versions on the General page.
5. On the Service Operation Version page, select the Active check box and click Save:



**Service Operation Version**

Service Operation: HD\_360\_REQUEST\_SYNC ☐ Default ☐ Active

Service: HD\_360\_REQUEST\_SYNC

Service Operation Version: VERSION\_1

Operation Type: Synchronous

Description: HR Helpdesk Message

Comments:

☐ Non-Repudiation

☐ Runtime Schema Validation

Add Fault Type

**Message Information**

Type: Request

Message.Version: HD\_360\_REQUEST\_SYNC.VERSION\_1 [View Message](#)

**Logical Transforms**

Mappings to and from the default service operation version: VERSION\_2 Request Message  
HD\_360\_REQUEST\_SYNC.VERSION\_1

Transform From Default: HD360\_REQ\_V2

Transform To Default:

Type: Response

Message.Version: HD\_360\_RESPONSE\_SYNC.VERSION\_1 [View Message](#)

**Logical Transforms**

Mappings to and from the default service operation version: VERSION\_2 Response Message  
HD\_360\_RESPONSE\_SYNC.VERSION\_2

Transform From Default: HD360\_RES\_V1

Transform To Default:

Save Return

Service Operation Version page

6. To activate the routing for HD360\_VERSION\_1:
  - a. Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service HD\_360\_REQUEST\_SYNC.
  - b. Go to the Routings tab and click HD360\_VERSION\_1:



General Handlers **Routings**

Service Operation: HD\_360\_REQUEST\_SYNC  
 Default Version: VERSION\_2  
 Routing Name:

Routing Definitions

Selected	Name	Version	Routing Type	Sender Node	Receiver Node	Direction	Status
<input type="checkbox"/>	-GEN-UPG-11870	VERSION_2	Synch	PSFT_CR	PSFT_HR	Outbound	Inactive
<input type="checkbox"/>	HD360_VERSION_1	VERSION_1	Synch	PSFT_CR	PSFT_HR	Outbound	Inactive
<input type="checkbox"/>	HD360_VERSION_2	VERSION_2	Synch	PSFT_CR	PSFT_HR	Outbound	Inactive

[Return to Service](#)

Routings page

- c. On the Routings Definitions page, select the active check box.

**Routing Definitions** Parameters Connector Properties

Routing Name: HD360\_VERSION\_1 ☐ Active

\*Service Operation: HD\_360\_REQUEST\_SYNC ☐ System Generated

Version: VERSION\_1

\*Description: HD360\_VERSION\_1

Comments:

\*Sender Node: PSFT\_CR

\*Receiver Node: PSFT\_HR

Routing Type: Synchronous ☐ User Exception

Object Owner ID: 360 Degree View

\*Log Detail: No Logging

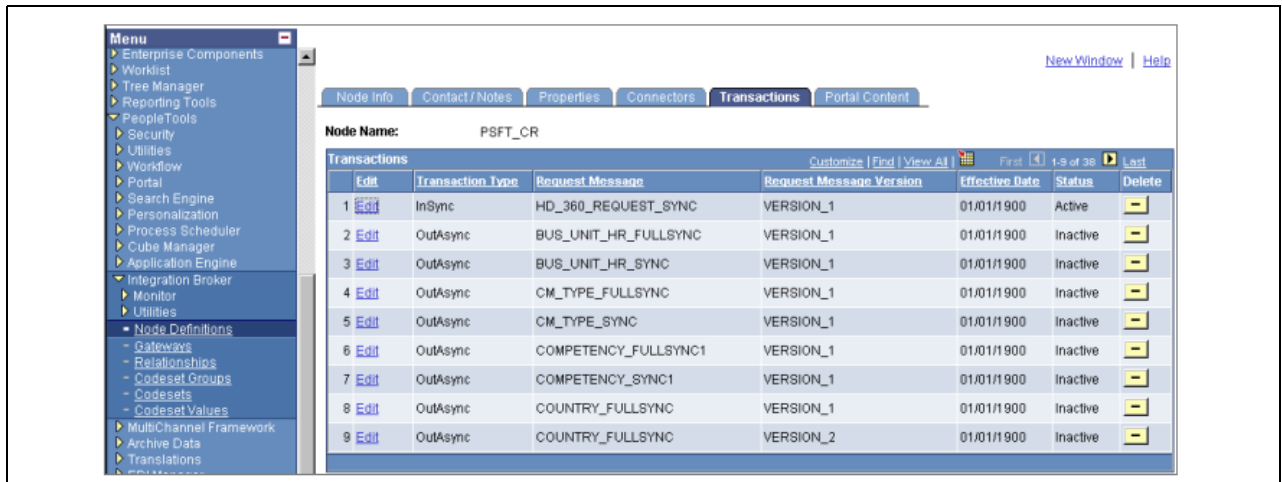
Routing Definitions page

## Task 6-7: Activating Transactions for the PSFT\_CR Node in PeopleSoft HRMS 8.8

Transactions are defined in the remote node of each system. Follow the steps in this task to activate transactions for the PSFT\_CR node in the PeopleSoft Enterprise HRMS 8.8 system.

To activate transactions for the PSFT\_CR node in PeopleSoft HRMS:

1. Open the PSFT\_CR node definition in the Node Definitions component. Select PeopleTools, Integration Broker, Node Definitions and select the PSFT\_CR node in PeopleSoft HRMS:



Node Definitions: Transactions page

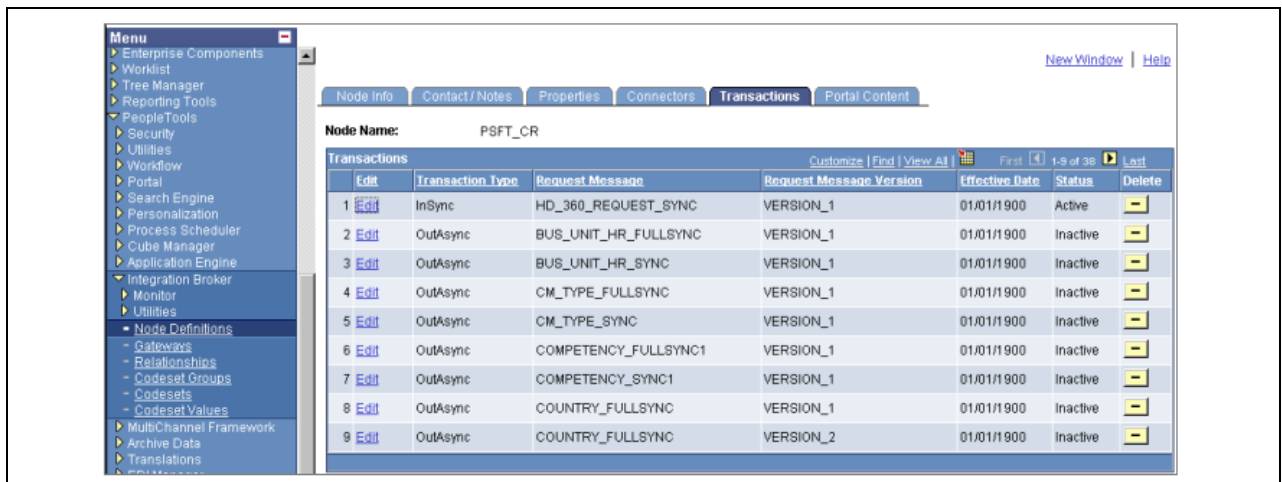
2. Change the status of the HD\_360\_REQUEST\_SYNC message to *Active*.
3. Click Save and OK to accept a related warning message you might get.

## Task 6-8: Activating Transactions for the PSFT\_CR Node in PeopleSoft HRMS 8.9

Transactions are defined in the remote node of each system. Follow the steps in this task to activate transactions for the PSFT\_CR node in the PeopleSoft Enterprise HRMS 8.9 system.

To activate transactions for the PSFT\_CR node in PeopleSoft HRMS:

1. Select PeopleTools, Integration Broker, Node Definitions and select the PSFT\_CR node in PeopleSoft HRMS:



Node Definitions: Transactions page

2. Select the Transactions tab of the Node Definitions component and click the Add Transaction button:

Node Name PSFT\_CR

Transactions						
	Transaction Type	Request Message	Request Message Version	Effective Date	Status	
1	InSync	HD_360_REQUEST_SYNC	VERSION_1	01/01/1900	Inactive	

Add Transaction Copy All Transactions

Transactions page

On the Add a New Value tab of the Node Transactions page, enter the information shown in the following page and click the Add button to add VERSION\_2 of the HD\_360\_REQUEST\_SYNC message:

Node Transactions

Find an Existing Value Add a New Value

Node Name: PSFT\_CR

Effective Date: 04/24/2006

Transaction Type: Inbound Synchronous

Request Message: HD\_360\_REQUEST\_SYNC

Request Message Version: VERSION\_2

Add

Node Transactions page

**Note.** The date in the Effective Date field represents the date from which the message is active; enter any date that meets your business needs.

- On the Transaction Detail page, set the status of the request message to *Active*.

Transactions Messages

Node Name PSFT\_CR

Transaction Detail

Effective Date 04/24/2006

Transaction Type InSync

Request Message HD\_360\_REQUEST\_SYNC

Request Message Version VERSION\_2

\*Status Inactive

☐ Override Connector

Comment

[Return to Transaction List](#)

Transactions - Transaction Detail page

4. On the Messages tab, under Response Message, set the Message Name to *HD\_360\_RESPONSE\_SYNC* and the Message Version to *VERSION\_2*:

Transactions Messages

Node Name PSFT\_CR

Transaction Messages Find | View All First 1 of 1 Last

Effective Date 04/24/2006

Status Inactive

Transaction Type InSync

\*Synchronous Logging No Logging

**Request Message**

Message Name HD\_360\_REQUEST\_SYNC

Message Version VERSION\_2

External Name

**Response Message**

Message Name HD\_360\_RESPONSE\_SYNC

Message Version VERSION\_2

External Name

[Return to Transaction List](#)

Save

Messages page

5. Click Save and OK to accept a related warning message you might get.

## Task 6-9: Setting Up Portal Content Links

You must define the portal content in order to enable the link from the case in PeopleSoft Enterprise HelpDesk for Human Resources to the 360-Degree View.

To define portal content:

1. In PeopleSoft Enterprise CRM, access the HRMS node in the Node Definitions component. Select PeopleTools, Portal, Node Definitions and specify the HRMS node.
2. In the Node definition component, select the Portal tab.

**Note.** This action enables the links on the case page to directly transfer from PeopleSoft Enterprise CRM to HRMS; this must be set up in the Node Definitions under Portal menu folder, not in the Integration Broker folder.

The screenshot shows the 'Node Definitions' page with the 'Portal' tab selected. The 'Node Name' is 'HRMS'. Under the 'Details' section, the 'Description' is 'Portal Node - HRMS'. The 'Tools Release' is set to 8.42 and the 'Application Release' is set to 8.8. The 'Content URI Text' field contains 'http://eiw009/psc/ps/' and the 'Portal URI Text' field contains 'http://eiw009/psp/ps/'. Both URI fields have example text above them: 'Example: http://someserver/psc/ps/home/' for Content URI and 'Example: http://someserver/psp/ps/home/' for Portal URI. A 'Local Node' checkbox is checked. At the bottom, there are 'Save' and 'Return to Search' buttons.

Node Definitions - Portal page

3. On the Portal page, enter the content URI text and portal URI text to define how PeopleSoft HRMS system users will transfer to and from the PeopleSoft Enterprise CRM system.
  - Content URI:  
http://<webserver\_machine\_name>:<Port>/psc/<PIA website name>/
  - Portal URI:  
http://<webserver\_machine\_name>:<Port>/psp/<PIA website name>/

The <webserver\_machine\_name> refers to the HRMS system and the <Port> value should be an HTTP port.
4. Click Save.

## Task 6-10: Activating the Link Category Definition in CRM (for integrations with HCM 8.8)

In CRM 9, the delivered active links are for HCM 8.9. If you are integrating to HCM 8.8, you must deactivate the 8.9 links and activate the 8.8 links in the CRM database.

To activate the link category definition for HRMS 8.8:

1. Select Home, Set Up CRM, Product Related, Call Center, Link Category.
2. Search for version 8.8:

**Link Category**  
Enter any information you have and click Search. Leave fields blank for a list of all values.


**Find an Existing Value** **Add a New Value**

**Link Category:** begins with

**Version:** =  8.8

**Active Flag:** =

**Long Description:** begins with

[Basic Search](#)  [Save Search Criteria](#)

**Search Results**

[View All](#) First  1-5 of 5  Last

Link Category	Version	Active Flag	Long Description	Short Name
<a href="#">BENEF</a>	8.8	Active	<a href="#">Benefits</a>	<a href="#">Benefits</a>
<a href="#">HRMS</a>	8.8	Active	<a href="#">HRMS</a>	<a href="#">Human Resources</a>
<a href="#">PAYR</a>	8.8	Active	<a href="#">Payroll</a>	<a href="#">Payroll</a>
<a href="#">STOCK</a>	8.8	Active	<a href="#">Stock</a>	<a href="#">Stock</a>
<a href="#">TRNG</a>	8.8	Active	<a href="#">Training</a>	<a href="#">Training</a>


Link Category search page

Carry out the following steps to deactivate each link category.

3. Click the Modify System Data button:

**Link Category Definition**

**Description** Appliances

**Link Category Definitions** [Customize](#) [Find](#)  First  1 of 1  Last

Link Category	Version	Active Flag	Order	Short Name	Long Description
HRMS	8.8	Active	10	Human Resources	HRMS

**This object is maintained by PeopleSoft.**

Link Category Definition page

4. Select *Inactive* from the Active Flag drop-down list box:



**Link Category Definition**

**Description** Appliances

**Link Category Definitions** Customize Find First 1 of 1 Last

*Link Category	*Version	*Active Flag	Order	*Short Name	*Long Description
HRMS	8.8	Inactive	10	Human Resources	HRMS

This object was delivered by PeopleSoft but updated by the customer.

Save Return to Search Next in List Previous in List Add Update/Display

Updated Link Category Definition page

5. Click Save.
6. Repeat steps 3 through 5 for each link category.



## CHAPTER 7

# Setting Up Integration Between PeopleSoft Enterprise CRM 9 and HRMS 8.3 SP1 or HRMS 8 SP1 for the HRHD Worker 360-Degree View

This chapter discusses:

- Prerequisites
- Creating the Local CRM Node in HRMS
- Adding the CRM Node for Single Signon in HRMS
- Adding AuthTokenDomain to Configuration.Properties in CRM and HRMS
- Adding the CPHD1000 Permission List to the Standard Non-Page Permissions Role in HRMS
- Testing XMLLink Services in HRMS
- Rebooting the HRMS Web Server and Application Server
- Activating the 360-Degree View EIP Application Messages in CRM
- Loading Connectors into Gateway in CRM
- Creating the XML Link for 360-Degree View Node in CRM
- Creating an Action Link Node in CRM
- Setting the Password for the Default Local Node in CRM
- Adding an Authentication Domain in CRM
- Activating the Link Category Definition in CRM
- Setting Up the Link Group in CRM
- Copying the HRMS CREF Project in CRM
- Rebooting the CRM Application and Web Servers
- Testing Action Links and HRHD 360-Degree View in CRM

---

**Note.** For information about setting up the integration between CRM 9 and HRMS 8.8 SP1, see the previous chapter.

Before proceeding with your installation, check PeopleSoft Customer Connection to ensure that you have the latest version of the following documents: PeopleSoft Enterprise PeopleTools Installation guide for your database platform and the *PeopleSoft Enterprise PeopleTools 8.48 PeopleBooks*.

In addition, you should consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on the PeopleSoft Customer Connection website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

---

## Prerequisites

This chapter provides instructions for setting up the 360-Degree View Enterprise Integration Point (EIP). This EIP enables access to the PeopleSoft Enterprise HelpDesk for Human Resources (HRHD) Worker 360-Degree View from PeopleSoft Enterprise CRM.

Before you perform the tasks in this chapter, you must have installed and configured a PeopleSoft Enterprise CRM 9 database and an HRMS 8.3 SP1 or HRMS 8 SP1 database.

**Note.** Before starting the tasks in this chapter, verify that xmllink is set up on the HRMS database.

See *PeopleSoft Business Interlinks PeopleBook* “Creating an Inbound Business Interlink.”

The pages shown in this chapter are for CRM 9 and HRMS 8.3 SP1. The node names may vary depending on your environment setup. The CRM local node is PSFT\_CR, and the HRMS 8.3 SP1 local node is PSFT\_HR.

Please apply the following updates, which are available on Customer Connection, for HRMS 8 SP1 and 8.3 SP1 databases. You must apply these updates before you begin the installation steps in this document:

- HRMS 8 SP1 - Update ID: 125495
- HRMS 8.3 SP1 - Update ID: 125492

## Task 7-1: Creating the Local CRM Node in HRMS

Carry out this task in the HRMS database.

Create a new Message Node in the HRMS database that matches the name of the CRM DEFAULT local node in the PeopleSoft Enterprise CRM database. The following example assumes that the local node on the CRM side is named PSFT\_CR:

To create the local CRM node in HRMS:

1. Launch Application Designer.
2. Select File, New, Message Node.
3. Right-click the location area to insert a location:



Message Node dialog box

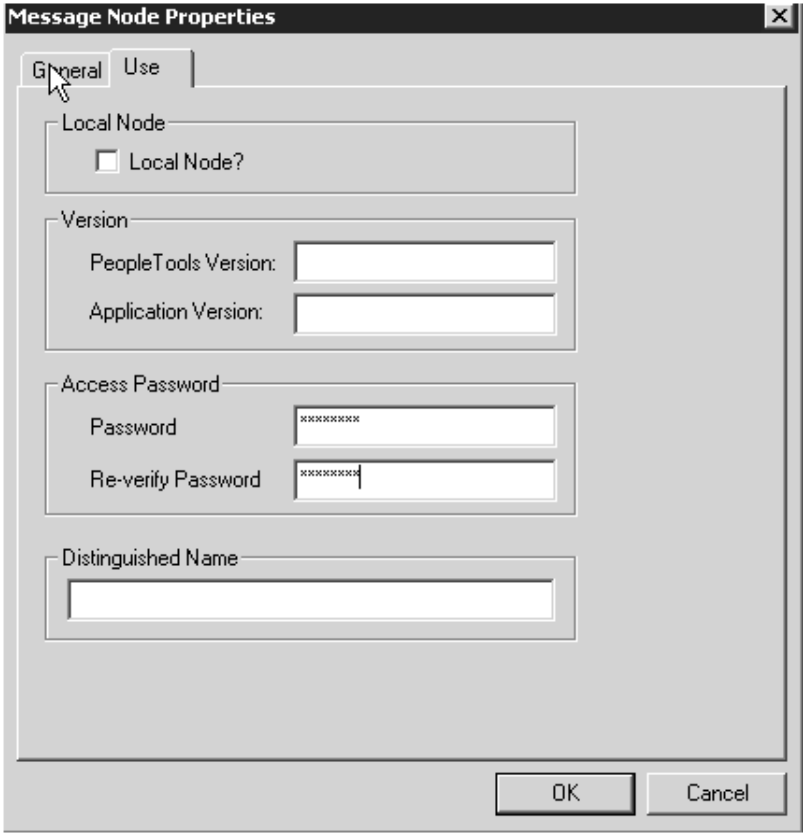
4. For the location of this node, insert the URL path to the CRM integration gateway.

The format of the location is as follows:

http://<servername.peoplesoft.com>/ PSIGW/PS81ListeningConnector

For example, http://pcas014.peoplesoft.com:8001/ PSIGW/PS81ListeningConnector

5. Click on properties of the Message Node:



Message Node Properties dialog box

6. Enter a password that matches the password on the CRM side for the CRM DEFAULT local node, PSFT\_CR, and save.

This example shows the page in PeopleSoft Enterprise CRM; this password must match the password set up in the human resources (HR) environment:

The screenshot shows the 'Node Definitions' page for a node named 'PSFT\_CR'. The page has tabs for 'Node Definitions', 'Connectors', 'Portal', 'WS Security', and 'Routings'. The 'Node Definitions' tab is active. The form contains the following fields and options:

- Node Name:** PSFT\_CR
- \*Description:** PSFT CRM - Local Node
- Node Type:** PIA
- \*Authentication Option:** Password (dropdown menu)
- Password:** [Masked with dots]
- \*Default User ID:** VP1
- Hub Node:** [Empty field]
- Master Node:** [Empty field]
- Company ID:** [Empty field]
- IB Throttle Threshold:** [Empty field]
- Image Name:** [Empty field]
- Code Set Group Name:** [Empty field]
- Options:**
  - ☒ Default Local Node
  - ☒ Local Node
  - ☒ Active Node
  - ☐ Non-Repudiation
  - ☐ Segment Aware
- Buttons:** Copy Node, Rename Node
- Links:** Contact/Notes, Properties

Example of the Node Definitions page for PSFT\_CR

## Task 7-2: Adding the CRM Node for Single Signon in HRMS

Carry out this task in the HRMS database.

Add the CRM node that was created in the HR database as a trusted domain. The HR environment needs to *trust* the source of the XML request, which will come from CRM.

To add the CRM node for single signon in HRMS:

1. Log into the HRMS database.
2. Select PeopleTools, Maintain Security, Setup, Single Signon:

The screenshot shows the 'Single Signon' page. It has a section for 'Authentication Token expiration time' with a value of 180 minutes. Below this is a table titled 'Trust Authentication Tokens issued by these Nodes'.

Message Node Name	Description	Local Node	Distinguished Name
HC831EIP	HC831EIP	1	
PSFT_CR	CRM - Local Node		
PSFT_HR	PS HRMS - Local Node		

Each row in the table has a '+' and '-' button to the right of the 'Distinguished Name' column.

Single Signon page

3. Click the + button in the Trust Authentication Tokens issued by these Nodes group box, and enter the name of the CRM node.

This example uses PSFT\_CR.

---

## Task 7-3: Adding AuthTokenDomain to Configuration.Properties in CRM and HRMS

To add AuthTokenDomain to the configuration.properties file of either the CRM or HRMS system:

1. Locate the configuration.properties file:

- If you used the default paths during installation, the default location for the file is:

C:\Apps\weblogic\myserver\psftdocs\peoplesoft8\configuration.properties

- If you did not use the default paths during installation, the configuration.properties file will be located as shown in this table:

Web Server	Directory
WebLogic version up to 6.1	C:\bea\wlserver6.1\config\peoplesoft\applications\PORTAL\WEB-INF\psftdocs\ps
WebLogic version post-6.1	<%PS_HOME%>\webserv\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps

2. Add the following parameter:

```
AuthTokenDomain = .<domain>.com
```

For example:

```
AuthTokenDomain = .peoplesoft.com
```

---

**Note.** Make sure you include a space in front of the first period (that is, after the “=” and before the domain). This space is required.

---

---

## Task 7-4: Adding the CPHD1000 Permission List to the Standard Non-Page Permissions Role in HRMS

Carry out this task in the HRMS database.

Add the CPHD1000 permission list to the Standard Non-Page Permissions Role. This permission list allows users to access the WEBLIB\_HRMS360 web library when a user attempts to retrieve HRMS data from the CRM HelpDesk 360 view.

To add the permission list:

1. Select PeopleTools, Maintain Security, Use, Roles, Update/Display (Standard Non-Page Permissions), Permission Lists tab.
2. Add the CPHD1000 permission list to the existing permission lists for the role, and then click Save.

Home > PeopleTools > Maintain Security > Use > Roles

General Permission Lists Members Dynamic Members Workflow Role Grant Links

Role Name: Standard Non-Page Permissions  
Description: Standard Non-Page Permissions

Permission List	Description		
CPHD1000	HRHD Agent Level 1	+	-
SPCMPINT	Standard Comp Intf Permissions	+	-
SPMSGCHN	Standard Message Channels	+	-
SPMSSCHG	Standard Mass Change Perm	+	-
SPPRCS	Standard Process Permissions	+	-
SPQUERY	Standard Query Permissions	+	-
SPSIGNON	Standard Signon Times	+	-
SPWEBLIB	Standard WebLib Permissions	+	-

Permission Lists page

## Task 7-5: Testing XMLLink Services in HRMS

Carry out this task in the HRMS database.

Access the xmllink servlet and verify that your service appears in the list.

To test XMLLink services in HRMS:

1. Enter the URL `http://<machine_name>:<port>/servlets/xmllink/<PIApath>` in a browser, where `<machine_name>` is the server name and `<PIApath>` is the default path for the PeopleSoft Pure Internet Architecture , normally peoplesoft8. For example:

`http://phas006.peoplesoft.com:7201/servlets/xmllink/h831pbxnt/`

A list of registered services appears:

**Click on a service to view DTD**

[HRMS360](#)  
[PREEMPLOYMENT](#)  
[PROCESS\\_EMPLINFO](#)  
[PROCESS\\_RESUME](#)  
[TAX\\_IMPORT](#)

List of registered XML services

2. Verify that your service appears in the list.

The previous example shows that this HRMS360 has been registered as an XML service.

**Note.** If this task fails, refer to ICE (#1512093000) and Resolution ID #674728 for possible solution.

## Task 7-6: Rebooting the HRMS Web Server and Application Server

Carry out this task in the HRMS database. Perform the remaining tasks in this chapter in the CRM database.

To reboot the HRMS web server and application server:

1. Clear the cache and reboot the application server.
2. Reboot the web server.

---

## Task 7-7: Activating the 360-Degree View EIP Application Messages in CRM

To activate the 360-Degree View EIP application messages in the CRM system:

1. Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service HD\_360\_REQUEST\_SYNC.
2. For integrations between CRM 9 and HCM 8.3, activate service operation HD\_360\_REQUEST\_SYNC.VERSION\_2 and service operation HD\_360\_REQUEST\_SYNC.VERSION\_1:
  - a. To activate HD\_360\_REQUEST\_SYNC.VERSION\_2, select the Active check box under Default Service Operation Version for VERSION\_2 on the General page:

**General** | Handlers | Routings

**Service Operation:** HD\_360\_REQUEST\_SYNC  
**Service:** HD\_360\_REQUEST\_SYNC  
**Operation Type:** Synchronous

**\*Operation Description:** HR Helpdesk Message ☐ User/Password Required

**Operation Comments:**

**Object Owner ID:** 360 Degree View

**Operation Alias:**

[Service Operation Security](#)

**Default Service Operation Version**

**\*Version:** VERSION\_2 ☒ **Default** ☐ **Active**

**Version Description:** HR Helpdesk

**Version Comments:**

☐ Non-Repudiation ☐ Runtime Schema Validation

[Introspection](#)

[Add Fault Type](#)

**Routing Status**

**Any-to-Local:** Does not exist  
**Local-to-Local:** Does not exist

**Routing Actions Upon Save**

☐ Generate Any-to-Local ☐ Generate Local-to-Local

**Message Information**

**Type:** Request  
**Message.Version:** HD\_360\_REQUEST\_SYNC.VERSION\_1 [View Message](#)

**Type:** Response  
**Message.Version:** HD\_360\_RESPONSE\_SYNC.VERSION\_1 [View Message](#)

**Non-Default Versions** [Customize](#) | [Find](#) | [First](#) | 1 of 1 | [Last](#)

Version	Description	Active
VERSION_1	HR Helpdesk Message	<input type="checkbox"/>

[Save](#) [Return to Service](#) [Add Version](#)

[General](#) | [Handlers](#) | [Routings](#)

General page

- To activate service operation HD\_360\_REQUEST\_SYNC.VERSION\_1, select VERSION\_1 under Non-Default Versions on the General page.
- On the Service Operation Version page, select the Active check box and Save:



**Service Operation Version**

Service Operation: HD\_360\_REQUEST\_SYNC ☐ Default ☐ Active

Service: HD\_360\_REQUEST\_SYNC

Service Operation Version: VERSION\_1

Operation Type: Synchronous

Description: HR Helpdesk Message

Comments:

☐ Non-Repudiation

☐ Runtime Schema Validation

Add Fault Type

**Message Information**

Type: Request

Message.Version: HD\_360\_REQUEST\_SYNC.VERSION\_1 [View Message](#)

**Logical Transforms**

Mappings to and from the default service operation version: VERSION\_2 Request Message  
HD\_360\_REQUEST\_SYNC.VERSION\_1

Transform From Default: HD360\_REQ\_V2

Transform To Default:

Type: Response

Message.Version: HD\_360\_RESPONSE\_SYNC.VERSION\_1 [View Message](#)

**Logical Transforms**

Mappings to and from the default service operation version: VERSION\_2 Response Message  
HD\_360\_RESPONSE\_SYNC.VERSION\_2

Transform From Default: HD360\_RES\_V1

Transform To Default:

Save Return

Service Operation Version page

- d. To activate the routing for HD360\_VERSION\_1, select PeopleTools, Integration Broker, Integration Setup, Routings and search for the service HD\_360\_REQUEST\_SYNC.
- e. On the Routings Definitions page, select the Active check box:

The screenshot shows the 'Routing Definitions' page in a PeopleSoft application. The page has three tabs: 'Routing Definitions', 'Parameters', and 'Connector Properties'. The 'Routing Definitions' tab is selected. The form contains the following fields and values:

- Routing Name:** HD360\_VERSION\_1
- \*Service Operation:** HD\_360\_REQUEST\_SYNC
- Version:** VERSION\_1
- \*Description:** HD360\_VERSION\_1
- Comments:** (empty text area)
- \*Sender Node:** PSFT\_CR
- \*Receiver Node:** PSFT\_HR
- Routing Type:** Synchronous
- Object Owner ID:** 360 Degree View
- \*Log Detail:** No Logging

There are also three checkboxes on the right side of the form:

- ☐ Active
- ☐ System Generated
- ☐ User Exception

At the bottom of the form are two buttons: 'Save' and 'Return'.

Routing Definitions page

## Task 7-8: Loading Connectors into Gateway in CRM

Carry out this task in the CRM database.

To load Gateway connectors in CRM:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Select Gateway ID = LOCAL.
3. Specify the Gateway URL.

Use this URL format:

`http://<webserver>/PSIGW/PeopleSoftListeningConnector`

For example, `http://pcas014.peoplesoft.com:8001/PSIGW/PeopleSoftListeningConnector`

4. Click Save:

**Gateways**

Gateway ID: LOCAL

☒ Local Gateway ☐ Load Balancer

URL:  [Properties](#)

[Load Gateway Connectors](#)

Connectors			Customize	Find	First	1-10 of 10	Last
*Connector ID	Description	*Connector Class Name					
1 FILEOUTPUT		SimpleFileTargetConnector	<a href="#">Properties</a>	+	-		
2 FTPTARGET		FTPTargetConnector	<a href="#">Properties</a>	+	-		
3 GETMAILTARGET		GetMailTargetConnector	<a href="#">Properties</a>	+	-		
4 HTTPTARGET		HttpTargetConnector	<a href="#">Properties</a>	+	-		
5 JMSTARGET		JMSTargetConnector	<a href="#">Properties</a>	+	-		
6 LDAPTARGET		LDAPTargetConnector	<a href="#">Properties</a>	+	-		
7 POP3TARGET		POP3TargetConnector	<a href="#">Properties</a>	+	-		
8 PSFT81TARGET		ApplicationMessagingTargetConnector	<a href="#">Properties</a>	+	-		
9 PSFTTARGET		PeopleSoftTargetConnector	<a href="#">Properties</a>	+	-		
10 SMTPTARGET		SMTPTargetConnector	<a href="#">Properties</a>	+	-		

[Save](#) [Return to Search](#)

Gateways page

5. Click Load Gateway Connectors.
6. Click Save.

## Task 7-9: Creating the XML Link for 360-Degree View Node in CRM

Carry out this task in the CRM database.

To create the XML link for 360-degree view node in CRM:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Search for the PSFT\_HR node. If the PSFT\_HR node is not available, add a new node value called PSFT\_HR.

This table lists the node name for each application:

Application	Node Name
HRMS 8.3 SP1	PSFT_HR
HRMS 8 SP1	PSFT_HR

**Node Definitions** | Connectors | Portal | WS Security | Routings

**Node Name:** PSFT\_HR Copy Node

**\*Description:** PS HRMS - Local Node Rename Node

**\*Node Type:** ICType Default Local Node

**\*Authentication Option:** Password Local Node

**Password:** ..... Active Node

**\*Default User ID:** VP1 Non-Repudiation

**Hub Node:** Segment Aware

**Master Node:**

**Company ID:**

**IB Throttle Threshold:**

**Image Name:**

**Code Set Group Name:**

[Contact/Notes](#) [Properties](#)

Node Definitions page for HD360\_83

The Node Type ICType is specific to the 8.1x toolset, in this case 8.19. For the 8.4 toolset, it would be PIA. The URL will be resolved and generated at runtime.

The Hub Node, Master Node, Company ID, Image Name, and Code Set Group Name fields are intentionally left blank. They are not necessary.

3. Accept the defaults (blanks) on the Contacts and Properties tabs.
4. Select the Connectors tab:

**Node Definitions** | **Connectors** | Portal | WS Security | Routings

**Node Name** PSFT\_HR Ping Node

**Details**

**Gateway ID** LOCAL

**Connector ID** HTTPTARGET

**Properties** Customize | Find First 1-3 of 3 Last

*Property ID	*Property Name	Required	Value
1 HEADER	sendUncompressed	<input checked="" type="checkbox"/>	Y
2 HTTPPROPERTY	Method	<input checked="" type="checkbox"/>	POST
3 PRIMARYURL	URL	<input checked="" type="checkbox"/>	http://adas0134.peoplesoft.com:62

[Password Encryption Utility](#)

Connectors page

5. Select the Gateway ID as *Local* and the Connector ID as *HTTPTARGET*.  
The *HEADER*, *HTTPPROPERTY*, and *PRIMARYURL* property ID's should then populate automatically.
6. Modify the value of the *PRIMARYURL* as follows:

`http://<machinename>:<port>/servlets/xmllink/<PIA instance>/HRMS360`

For example, `http://phas006.peoplesoft.com:7201/servlets/xmllink/h831pbxnt/HRMS360?userid=PS&pwd=PS`

7. Select the Portal tab.

The screenshot shows the 'Portal' tab selected in a window titled 'Node Definitions'. The 'Node Name' is 'PSFT\_HR'. Under the 'Details' section, the 'Description' is 'PS HRMS - Local Node' with a 'Local Node' checkbox. The 'Tools Release' is '8.22.04' and the 'Application Release' is '8.00'. The 'Content URI Text' field has an example URL: 'http://adas0134.peoplesoft.com:6200/servlets/iclientservlet/EM\_HC831EIP\_TS101330/'. The 'Portal URI Text' field is empty with another example URL: 'http://someserver/psp/pshome/'. At the bottom are 'Save' and 'Return to Search' buttons.

Portal page

8. Set the Content URI Text field to the web directory of your HR domain.

The URI has the following format:

`http://<machine_name>:<port>/servlets/iclientservlet/<PIA instance>/`

For example, `http://phas006.peoplesoft.com:7201/servlets/iclientservlet/h831pbxnt/`

9. Click Save.

## Task 7-10: Creating an Action Link Node in CRM

Carry out this task in the CRM database.

To create an action link node in the CRM database:

1. Select Home, PeopleTools, Portal, Node Definitions.
2. Click Add a New Value, and enter the appropriate node name, as shown in the following table:

**Note.** You must enter the correct node names for the links to work.

Application	Node Name
HRMS 8.3 SP1	HRMS_83
HRMS 8 SP1	HRMS_80

The screenshot shows the 'Node Definitions' page for the node 'HRMS\_83'. The page has tabs for 'Node Definitions', 'Connectors', 'Portal', 'WS Security', and 'Routings'. The 'Node Definitions' tab is active. The fields are as follows:

- Node Name:** HRMS\_83
- \*Description:** Portal Node - HRMS
- \*Node Type:** IType (dropdown menu)
- \*Authentication Option:** None (dropdown menu)
- Default Local Node:** ☐
- Local Node:** ☐
- Active Node:** ☒
- Non-Repudiation:** ☐
- Segment Aware:** ☐
- \*Default User ID:** (text field with search icon)
- Hub Node:** (text field with search icon)
- Master Node:** (text field with search icon)
- Company ID:** (text field)
- IB Throttle Threshold:** (text field)
- Image Name:** (text field with search icon)
- Code Set Group Name:** (text field with search icon)
- Contact/Notes:** (link)
- Properties:** (link)
- Save:** (button)

Node Definitions page

Specify the following values on this page; all other information is optional:

**Node Type** Enter *IType*.

**Authentication Option** Enter *None*.

**Active Node** Select this check box.

Information on the Connectors tab is not needed for this node.

3. Select the Portal tab:

Node Definitions Connectors **Portal** WS Security Routings

**Node Name** HRMS\_83

**Details**

**Description** Portal Node - HRMS ☐ **Local Node**

**Tools Release**

**Application Release**

**Content URI Text**

**Portal URI Text**

Portal page

4. Set the Content URI Text and Portal URI Text fields to the web directory of your HR domain.  
The URI has the following format: `http://<machine_name>:<port>/servlets/iclientservlet/<PIA instance>`  
For example, `http://phas006.peoplesoft.com:7201/servlets/iclientservlet/h831pbxnt/`
5. Save the node.

## Task 7-11: Setting the Password for the Default Local Node in CRM

Carry out this task in the CRM database.

To set the password for the CRM default Local Node:

1. Select Home, PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Search for the CRM DEFAULT local node, PSFT\_CR.
3. Enter a password that matches the password on the HRMS side for the CRM DEFAULT local node of PSFT\_CR:



The screenshot shows the 'Node Definitions' page for a node named 'PSFT\_CR'. The 'Description' is 'PSFT CRM - Local Node' and the 'Node Type' is 'PIA'. The 'Authentication Option' is set to 'Password'. The 'Password' field is masked with dots. The 'Default User ID' is 'VP1'. There are search icons next to the 'Default User ID', 'Hub Node', 'Master Node', 'Image Name', and 'Code Set Group Name' fields. On the right, there are checkboxes for 'Default Local Node', 'Local Node', 'Active Node', 'Non-Repudiation', and 'Segment Aware'. At the top right, there are buttons for 'Copy Node' and 'Rename Node'. At the bottom, there are links for 'Contact/Notes' and 'Properties'.

Node Definitions page for PSFT\_CR

## Task 7-12: Adding an Authentication Domain in CRM

Carry out this task in the CRM database.

To add an authentication domain in CRM:

1. Select PeopleTools, Web Profile, Web Profile Configuration.
2. Add the authentication domain as `.<domain>.com`. (For example, `.peoplesoft.com`)

The screenshot shows the 'Web Profile Configuration' page. The 'Profile Name' is 'DEV' and the 'Description' is 'Installation Defaults'. The 'Authentication Domain' is set to '.peoplesoft.com'. There are search icons next to the 'Authentication Domain' and 'Help URL' fields. On the right, there are checkboxes for 'Compress Responses', 'Compress Response References', 'Compress Mime Types', and 'Compress Query'. The 'Compress Mime Types' field contains 'application/x-javascript,text/javascript,text/css,text/html'. At the bottom, the 'Save Confirmation Display Time' is set to '3,000' milliseconds. On the left, there is a navigation tree with 'Web Profile Configuration' selected.

Web Profile Configuration page

3. Restart the web domain.



## Task 7-13: Activating the Link Category Definition in CRM

Carry out this task in the CRM database.

To activate the link category definition for HRMS 8 or 8.3:

1. Select Home, Set Up CRM, Product Related, Call Center, Link Category.
2. Search for the HRMS version (8 SP1 or 8.3) that is integrated with CRM 9:

**Link Category**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** **Add a New Value**

**Link Category:** begins with

**Version:** =  8.3

**Active Flag:** =

**Long Description:** begins with

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

**Search Results**

View All First 1-5 of 5 Last

Link Category	Version	Active Flag	Long Description	Short Name
<a href="#">BENEF</a>	<a href="#">8.3</a>	<a href="#">Inactive</a>	<a href="#">Benefits</a>	<a href="#">Benefits</a>
<a href="#">HRMS</a>	<a href="#">8.3</a>	<a href="#">Inactive</a>	<a href="#">HRMS</a>	<a href="#">Human Resources</a>
<a href="#">PAYR</a>	<a href="#">8.3</a>	<a href="#">Inactive</a>	<a href="#">Payroll</a>	<a href="#">Payroll</a>
<a href="#">STOCK</a>	<a href="#">8.3</a>	<a href="#">Inactive</a>	<a href="#">Stock</a>	<a href="#">Stock</a>
<a href="#">TRNG</a>	<a href="#">8.3</a>	<a href="#">Inactive</a>	<a href="#">Training</a>	<a href="#">Training</a>

Link Category search page

3. Click the Modify System Data button:

**Link Category Definition**

**Description** Appliances

**Link Category Definitions** [Customize](#) [Find](#) First 1 of 1 Last

Link Category	Version	Active Flag	Order	Short Name	Long Description
HRMS	8.3	Inactive	10	Human Resources	HRMS

**Modify System Data**

**This object is maintained by PeopleSoft.**

[Save](#) [Return to Search](#) [Next in List](#) [Previous in List](#) [Add](#) [Update/Display](#)

Link Category Definition page

4. Select *Active* from the Active Flag drop-down list box:

**Link Category Definition**

**Description** Appliances

**Link Category Definitions** Customize Find First 1 of 1 Last

*Link Category	*Version	*Active Flag	Order	*Short Name	*Long Description
HRMS	8.3	Active	10	Human Resources	HRMS

This object was delivered by PeopleSoft but updated by the customer.

Save Return to Search Next in List Previous in List Add Update/Display

Modified Link Category Definition page

5. Click Save.
6. Repeat steps 3 through 5 for each link category.

**Note.** For CRM 9, HCM 8.9 action links are set to Active when delivered. If you are integrating with HCM 8.3, you must inactivate the HCM 8.9 categories and activate the HCM 8.3 categories.

## Task 7-14: Setting Up the Link Group in CRM

Carry out this task in the CRM database.

To set up the link group in CRM:

1. Select Home, Set Up CRM, Product Related, Call Center, Link Group.
2. Click Search and select *HRMS* from the Search Results list:

**Link Group**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** **Add a New Value**

**Link Group ID:** begins with

**Description:** begins with

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

**Search Results**

View All First 1-10 of 10 Last

Link Group ID	Description
<a href="#">COM</a>	<a href="#">Communications</a>
<a href="#">ENG</a>	<a href="#">Energy</a>
<a href="#">FIN</a>	<a href="#">Financials</a>
<a href="#">GOV</a>	<a href="#">Government</a>
<a href="#">HDREL</a>	<a href="#">Helpdesk Related Actions</a>
<a href="#">HITEC</a>	<a href="#">Hi-Technology</a>
<a href="#">HRMS</a>	<a href="#">HR Helpdesk</a>
<a href="#">INS</a>	<a href="#">Insurance</a>
<a href="#">SACT</a>	<a href="#">Suggested Actions</a>
<a href="#">SPRT</a>	<a href="#">Support Related Actions</a>

Link Group search page

- Click the System Data tab and click the System Data button on each of the rows:

**Link Group**  
**Link Group**

**Link Group** HRMS

**\*Description** HR Helpdesk

**Link Selection** [Customize](#) [Find](#) [Grid](#) First 1-53 of 53 Last

**Links** **System Data** [PDF](#)

System Data	Message Description	Date Modified	Modified By		
System Data	This object is maintained by PeopleSoft.	10/26/2004 10:19AM		+	-
System Data	This object is maintained by PeopleSoft.	10/26/2004 10:19AM		+	-
System Data	This object is maintained by PeopleSoft.	12/16/2004 4:26PM		+	-
System Data	This object is maintained by PeopleSoft.	12/16/2004 4:26PM		+	-
System Data	This object is maintained by PeopleSoft.	10/26/2004 10:19AM		+	-
System Data	This object is maintained by PeopleSoft.	10/26/2004 10:19AM		+	-

Link Group page - System Data tab

- Click the Links tab and select 8.3 in the Version field for each of the rows:

**Link Group**  
Link Group

**Link Group** HRMS

\*Description HR Helpdesk

**Link Selection** Customize Find First 1-40 of 40 Last

**Links** System Data

*Link Category	*Version	*Link Name		
Benefits	8.3	Election Entry	+	-
Benefits	8.3	Benefits Summary	+	-
Benefits	8.3	Dependents/Beneficiaries	+	-
Benefits	8.3	Disability Plans	+	-
Benefits	8.3	Create Event	+	-
Benefits	8.3	FSA Plans (CAN)	+	-

Link Group page - Links tab

5. Delete any rows where the Link Name value is (*Invalid Value*).
6. Save.

## Task 7-15: Copying the HRMS CREF Project in CRM

Carry out this task in the CRM database.

Use Application Designer to import the HRMS80\_CREFS or HRMS83\_CREFS project that corresponds to HRMS 8 SP1 or 8.3 SP1 into the CRM database.

Select Tools, Copy Project, From File.

These project files are delivered on the PeopleSoft CD and should have been installed on the specified Windows File Server in the following directory, where <PS\_HOME> refers to the location where PeopleTools was installed on the Windows File Server:

<PS\_HOME>\projects\HRMS80\_CREFS

<PS\_HOME>\projects\HRMS83\_CREFS

## Task 7-16: Rebooting the CRM Application and Web Servers

Carry out this task in the CRM database.

To reboot the CRM application and web servers:

1. Clear the cache and reboot the application server.
2. Reboot the web server.

## Task 7-17: Testing Action Links and HRHD 360-Degree View in CRM

This section discusses:

- Testing Action Links
- Testing the HRHD 360-Degree View

### Task 7-17-1: Testing Action Links

Carry out this task in the CRM database.

Use PeopleSoft Pure Internet Architecture to log in to the CRM database as HHDUSA\_AGT3/HHDUSA\_AGT3 to complete the procedures in this task.

To test action links:

1. Select Home, HelpDesk.
2. Click the second Add Case link to add a new case in HRHD.
3. Select the More tab in the Case Information region.
4. Select the business unit *HR Help Desk USA*.
5. Search for employee ID KU0113.
6. Enter a summary and description.
7. Click Save Case.

This example shows a completed Case page:

Example of the Case page

8. Select any link from the Actions region and click the Go button.

The system launches a new window and opens an HR page without any errors.

For example, when you select Personal Data from HRMS and click Go:

Case page: Actions region

The Personal Data page from the HR database opens:

The screenshot displays the 'Personal Data' page with the 'Name History' tab selected. At the top, the employee ID 'KU0113' and name 'Employee' are shown. Below this, the 'Name Type' is set to 'Primary'. The 'Name History' section shows a table with one entry: 'Effective Date' 04/01/1999, 'Format Using' USA, and 'United States'. The 'Person Name' section includes fields for 'Prefix', 'First' (Cassandra), 'Middle', 'Last' (Jacobson), and 'Suffix'. The 'Name' field displays 'Jacobson,Cassandra'. At the bottom, there are navigation buttons: Save, Return to Search, Next in List, Previous in List, Previous tab, Next tab, Refresh, Update/Display, Include History, and Correct History. A breadcrumb trail at the bottom reads: Name History | Address History | Personal History | Identity/Diversity.

Personal Data page - Name History tab

## Task 7-17-2: Testing the HRHD 360-Degree View

Carry out this task in the CRM database.

Use PIA to log into the CRM database as HHDUSA\_AGT3/ HHDUSA\_AGT3 to complete the procedures in this task.

To test the HRHD 360-degree view:

1. Select HRHD Worker 360-Degree View from the menu.
2. Enter *KU0113* in the EmplID field and click Search:



HRHD Worker 360-Degree View search page

The Worker 360-Degree View and Worker record are populated with data from the HRMS database:



The screenshot displays the '360-Degree View' interface for a user named Cassandra Jacobson. The page is divided into several sections:

- Summary:** Displays personal and contact information for Cassandra Jacobson, including Employee ID (KU0113), Home Phone, Effective Date (08/14/2002), Gender (Female), Social Security Number (238-12-0982), Home Address (101 Little Rd, Springboro, OH 45066, USA), Business Email, Date of Birth (06/01/1964), Marital Status (Married), and Emergency Contact. A 'View Worker Details' link is provided.
- Activities:** Includes a 'Date Filter' set to '6 - Last Year' and a tree view under 'Overview of - Cassandra Jacobson' showing 'Cases' and 'Interactions - (0)'. The 'Cases' section is further divided into 'HR HelpDesk Cases' (Authorized Cases - (1), Open - (1), View All) and 'IT HelpDesk Cases' (Unauthorized Cases - (0), View All, Add HR Case, Search HR Cases, Add IT Case, Search IT Cases).
- Authorized Cases:** A table showing one case with ID 220496, Summary 'test', Priority 'Medium', and Status 'Open - New'. The table has columns for Case ID, Summary, Priority, and Status. Navigation links like 'First', '1 of 1', and 'Last' are present.
- Actions:** A dropdown menu is set to 'Add HR Helpdesk Case' with a 'Go' button.
- Current Actions:** A section for tracking recent actions.

A note at the bottom states: 'Date filter does not apply to this node'.

Worker 360-Degree View page

HR Information																									
<b>As Of Date</b>	06/09/2006 [X] Go																								
<b>Job and Position Summary</b> First 1 of 4 Last																									
<b>Job Code</b> KU099	<b>Job Description</b> HRIS Specialist																								
<b>Date of Hire</b> 04/01/1999	<b>Person Type</b>																								
<b>Employment Status</b> Active	<b>Employment Status</b> 04/01/1999																								
	<b>Date</b>																								
<b>Position</b> HRIS Specialist	<b>Business Unit</b> GBIBU																								
<b>Company</b>	<b>Location</b> Corporation Headquarters																								
<b>Establishment</b>	<b>Department</b> Human Resources																								
<b>Supervisor EmplID</b>	<b>Supervisor Name</b>																								
<b>Regular/Temporary</b> Regular	<b>Full/Part Time</b> Full-Time																								
<b>Standard Hours</b> 40.00	<b>Work Period</b>																								
<b>Labor Agreement</b>	<b>Employee Category</b>																								
<b>Payroll System</b> Payroll for North America																									
<b>Pay Summary</b>																									
Secured	NO ACCESS TO COMPONENT PAY_CHECK																								
<b>Benefits Information</b> First 1 of 2 Last																									
<b>Benefit Record Number</b> 1	<b>Currency Code</b> USD																								
<b>COBRA Event Identification</b> 0																									
<b>Dependents/Beneficiaries</b>																									
No Benefits exist for this Person.	<table border="1"> <thead> <tr> <th>Name</th> <th>Relationship</th> <th>Type of Benefit</th> <th>Coverage</th> </tr> </thead> <tbody> <tr> <td>Palooka,Patrick</td> <td>Spouse</td> <td></td> <td></td> </tr> <tr> <td>Hayster,Darren</td> <td>ExSpouse</td> <td></td> <td></td> </tr> <tr> <td>Jacobson,Buford D</td> <td>Son</td> <td></td> <td></td> </tr> <tr> <td>Jacobson,Lacy D</td> <td>Daughter</td> <td></td> <td></td> </tr> <tr> <td>Palooka,Wanda</td> <td>Daughter</td> <td></td> <td></td> </tr> </tbody> </table>	Name	Relationship	Type of Benefit	Coverage	Palooka,Patrick	Spouse			Hayster,Darren	ExSpouse			Jacobson,Buford D	Son			Jacobson,Lacy D	Daughter			Palooka,Wanda	Daughter		
Name	Relationship	Type of Benefit	Coverage																						
Palooka,Patrick	Spouse																								
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Jacobson,Lacy D	Daughter																								
Palooka,Wanda	Daughter																								
<b>Direct Reports</b>																									
No Direct Reports exists for this person.																									
<a href="#">Refresh</a>   <a href="#">New Search</a>   <a href="#">Notification</a>   <a href="#">Correspond</a>   <a href="#">Top of Page</a>																									

Worker Detail page

## CHAPTER 8

# Installing the PeopleSoft Enterprise CRM 9 Portal Pack

This chapter discusses:

- Understanding the CRM 9 Portal Pack Installation
- Granting Access to the PeopleSoft Enterprise CRM 9 Portal Pack Homepage Personalization
- Accessing PeopleSoft Enterprise CRM 9 from PeopleSoft 8.9x Enterprise Portal

---

## Understanding the CRM 9 Portal Pack Installation

If you use the PeopleSoft Enterprise CRM Portal Pack without the PeopleSoft Enterprise Portal, you need to enable users to personalize their Portal Pack homepage. If you have implemented the PeopleSoft Enterprise Portal and want to access PeopleSoft CRM 9 from within the PeopleSoft Enterprise Portal database, you will need to set up a link to PeopleSoft Enterprise CRM 9 and enable single signon.

All tasks in this chapter must be completed for both the System and Demo databases unless otherwise indicated in the task.

---

**Note.** Before proceeding with the installation, check PeopleSoft Customer Connection to ensure that you have the latest version of the following documents: PeopleSoft Enterprise PeopleTools Installation guide for your database platform and PeopleSoft Enterprise PeopleTools 8.48 PeopleBooks.

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**Note.** In addition, you should consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on the PeopleSoft Customer Connection website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

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## Task 8-1: Granting Access to the PeopleSoft Enterprise CRM 9 Portal Pack Homepage Personalization

This section discusses:

- Updating the Homepage Personalization Permission List
- Adding the Portal User Role to the User IDs

## Task 8-1-1: Updating the Homepage Personalization Permission List

To add, remove, or change the layout of the homepage, the homepage personalization security access must be granted to all non-guest users.

To update the homepage Personalization Permission List:

1. Sign on with PeopleSoft Data Mover to the CRM 9 database.
2. Open the Data Mover script <PS\_HOME>\scripts\ PORTAL\_HP\_PERS.DMS.
3. Run this script against the PeopleSoft CRM 9 database.
4. Close Data Mover.

## Task 8-1-2: Adding the Portal User Role to the User IDs

To add the Portal user role to the user IDs:

1. Sign on with PeopleSoft Data Mover to the PeopleSoft CRM 9 database.
2. Open the Data Mover script <PS\_HOME>\scripts\ PORTAL\_ADD\_ROLE.DMS.
3. Run this script against the PeopleSoft CRM 9 database.
4. Close Data Mover.

---

**Note.** The PAPP\_USER and PeopleSoft Guest role should be granted to all new User IDs for access to the Homepage personalization and left-hand navigation menu. After running this script, the role PAPP\_USER should be manually removed from any GUEST User ID, since the GUEST user should not be personalizing the common homepage.

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## Task 8-2: Accessing PeopleSoft Enterprise CRM 9 from PeopleSoft 8.9x Enterprise Portal

The installation phase of your PeopleSoft application should only entail setting up a single link to the application content provider, PeopleSoft Enterprise CRM 9.

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**Note.** Only perform this task if you own the PeopleSoft Enterprise Portal product and want to access your application from within the PeopleSoft Enterprise Portal database.

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To set up the link and the single signon, see the *PeopleSoft Enterprise Portal Solutions 8.9 Installation* document on Customer Connection at <http://www4.peoplesoft.com/cc/>. See the table of contents for chapters about setting up single signon to your application database and accessing the PeopleSoft content providers.

See *Portal Products 8.4 Installation Guide*, PeopleSoft Customer Connection, (Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes, Enterprise, Portal Products).

---

**Note.** When you begin your implementation phase, refer to the Enterprise Portal 8.4x - Implementing Navigation and Portal Packs document on Customer Connection. This documentation discusses your options for handling the PeopleSoft content provider navigation and where to find all the needed scripts, projects, and documentation.

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See “Enterprise Portal 8.4x - Implementing Navigation and Portal Packs,” PeopleSoft Customer Connection, (Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes, Enterprise, Portal Products).



## CHAPTER 9

# Installing the PeopleSoft Enterprise Advanced Configurator 9

This chapter discusses:

- Understanding the Advanced Configurator Installation
- Installing the WebLogic Application Server on Windows
- Installing the PeopleSoft Enterprise Advanced Configurator Server on Windows
- Starting and Configuring the PeopleSoft Enterprise Advanced Configurator Server on Windows
- Installing the PeopleSoft Enterprise Advanced Configurator on Solaris
- Installing the WebLogic Application Server on Solaris
- Installing the PeopleSoft Enterprise Advanced Configurator Server on Solaris
- Starting and Configuring the PeopleSoft Enterprise Advanced Configurator Server on Solaris
- Installing the PeopleSoft Visual Modeler
- Installing for Integration to PeopleSoft Enterprise Order Capture
- (Optional) Installing Multiple Configurator Instances on Windows

Before proceeding with your installation, check PeopleSoft Customer Connection to ensure that you have the latest version of the following documents: PeopleSoft Enterprise PeopleTools 8.48 Installation guide for your database platform and PeopleSoft Enterprise PeopleTools 8.48 PeopleBooks.

---

**Note.** In addition, you should consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on the PeopleSoft Customer Connection website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

---

## Understanding the Advanced Configurator Installation

This section discusses:

- Prerequisites
- Reviewing the PeopleSoft Enterprise Advanced Configurator Installation Process
- Understanding Visual Modeler and Advanced Configurator Server

## Prerequisites

Before attempting to install Advanced Configurator, please refer to *PeopleSoft Enterprise CRM 9 Hardware and Software Requirements* available on Customer Connection for the latest supported platform information. Note that Advanced Configurator supports only a subset of the operating systems, DataBases, WebServers, and so on that PeopleSoft PeopleTools supports.

## Reviewing the PeopleSoft Enterprise Advanced Configurator Installation Process

The following general steps are intended only for reference. They summarize the procedures for properly installing the PeopleSoft Enterprise Advanced Configurator components. Each of these steps is described in greater detail in subsequent tasks in this chapter. This summary applies to the installation on either Microsoft Windows or Sun Solaris operating systems:

1. Install the BEA WebLogic Application Server 8.1SP5 (hereafter known as WebLogic 8.1SP5).

---

**Note.** The Java Development Kit (JDK) 1.4.2 is installed in subdirectories of WebLogic as part of the WebLogic 8.1SP5 installation on Microsoft Windows and Sun Solaris. However, on IBM AIX you will need to separately download and install the appropriate JDK from IBM. Once it is downloaded, you will need to modify the execution PATH environment variable to ensure that the directory containing the javac executable is included in the path. This directory is usually the 'bin' directory of the JDK.

---

2. Install and configure the appropriate database for your system platform type.
3. Install the Advanced Configurator Server.
4. Configure WebLogic 8.1SP5 and the PeopleSoft Enterprise Advanced Configurator Server. Restart the system if you are installing on a Microsoft Windows server.
5. If you want to install a newer, supported Weblogic Service Pack other than SP5, you can do so now.
6. If you are integrating with PeopleSoft Enterprise Order Capture, perform the related setup at this stage.
7. Install PeopleSoft Visual Modeler.

Uninstalling PeopleSoft Enterprise Advanced Configurator components from your system requires that you follow a specific order of removal:

1. Remove Advanced Configurator Visual Modeler if it is installed on the same machine as the server.
2. Remove Advanced Configurator Server.
3. Remove WebLogic 8.1 SP5.

## Understanding Visual Modeler and Advanced Configurator Server

Depending on the phase of model development, PeopleSoft Visual Modeler can be run as a standalone application or in conjunction with the PeopleSoft Enterprise Advanced Configurator Server. Thus, you can install them either on the same system or on different systems in a distributed network environment.

The PeopleSoft Enterprise Advanced Configurator Server was designed with technology that supports configuration modeling and runtime configuration processing. The PeopleSoft Visual Modeler is a hierarchical modeling tool that is used for designing complex configuration solutions. Model data can be defined in the model or obtained from a relational database.



The PeopleSoft Enterprise Advanced Configurator Server uses a compiled version of a model defined with the PeopleSoft Visual Modeler. Configurations are created from user selections made against the model and the Configuration Server at runtime.

---

## Task 9-1: Installing the WebLogic Application Server on Windows

This section discusses:

- Installing WebLogic
- Running WebLogic as a Service
- Changing the WebLogic System Password
- Uninstalling WebLogic

### Task 9-1-1: Installing WebLogic

This section describes the installation process of the WebLogic Application Server. The WebLogic 8.1SP5 software provided with this release includes and installs JDK 1.4.2.

To install the WebLogic application server:

1. Log in as Windows Server Administrator.
2. Insert the PeopleSoft Enterprise CRM WebLogic CD-ROM and install the file `server815_win32.exe`.
3. Select a location for the WebLogic server.

You should run Advanced Configurator on a different instance of WebLogic than other PeopleSoft applications. Thus, if WebLogic 8.1SP5 is already installed on this server, you should install another copy of WebLogic to a different directory to accommodate Advanced Configurator.

4. When the installation is complete, clear the check boxes of the options to install XMLSpy and run Quick Start.

---

**Note.** Oracle's PeopleSoft Enterprise PeopleTools and PeopleSoft Enterprise Advanced Configurator Server must run on separate instances of WebLogic 8.1SP5. Multiple instances of WebLogic can be run concurrently on the same server as long as they are all listening on different ports.

---

### Task 9-1-2: Running WebLogic as a Service

The PeopleSoft Enterprise Advanced Configurator Server is not affected by whether or not you run WebLogic 8.1SP5 as a Windows Service on your system. However, if you do run it as a service, you must stop it in the Windows Services window before you attempt to uninstall it.

---

**Important!** You should not set up WebLogic to run as a service; instead, set up the Advanced Configurator Server to run as a service.

---

Once you have installed WebLogic 8.1SP5, its directory locations are mapped to variables used by the Advanced Configurator Server and Visual Modeler. These directory locations are important to the proper installation and operation of the PeopleSoft Enterprise Advanced Configurator Server.

Do not move WebLogic 8.1SP5 to another directory. If you must change its location, uninstall and reinstall it rather than moving the WebLogic directories.

### Task 9-1-3: Changing the WebLogic System Password

You should install the PeopleSoft Enterprise Advanced Configurator Server before changing the WebLogic password. See the next section in this chapter for detailed instructions.

See Installing the PeopleSoft Enterprise Advanced Configurator Server.

### Task 9-1-4: Uninstalling WebLogic

Select the uninstall utility provided by WebLogic 8.1SP5 as follows: Start, Programs, BEA WebLogic E-Business Platform, WebLogic Server 8.1SP5, Uninstall WebLogic Server 8.1SP5 (SP5).

---

## Task 9-2: Installing the PeopleSoft Enterprise Advanced Configurator Server on Windows

This section discusses:

- Installing the Advanced Configurator Server
- Changing the WebLogic System Password
- Uninstalling the Configuration Server

### Task 9-2-1: Installing the Advanced Configurator Server

This section describes how to install the PeopleSoft Enterprise Advanced Configurator Server on a Windows Server system.

The installation of PeopleSoft Enterprise Advanced Configurator Server includes the optional creation of database tables if needed. However, the database and connectivity must already exist. The database can be the PeopleSoft Enterprise CRM database if you are installing with other PeopleSoft Enterprise CRM applications. Please note that if you are using PeopleSoft Enterprise CRM and want to install Advanced Configurator with a different database you may do so, however, you will lose all of the schema-related functionality and some of the shipped sample models won't work.

PeopleSoft Enterprise Advanced Configurator Server installation allows you to specify the port number of the Advanced Configurator database if it is different from the default setting. Check with your database administrator if you are not sure of the appropriate port setting.

---

**Note.** Before proceeding with the PeopleSoft Enterprise Advanced Configurator Server installation, install the custom PeopleSoft Enterprise Advanced Configurator database or PeopleSoft Enterprise CRM database. Make sure the database has a user login with permission to create tables.

---

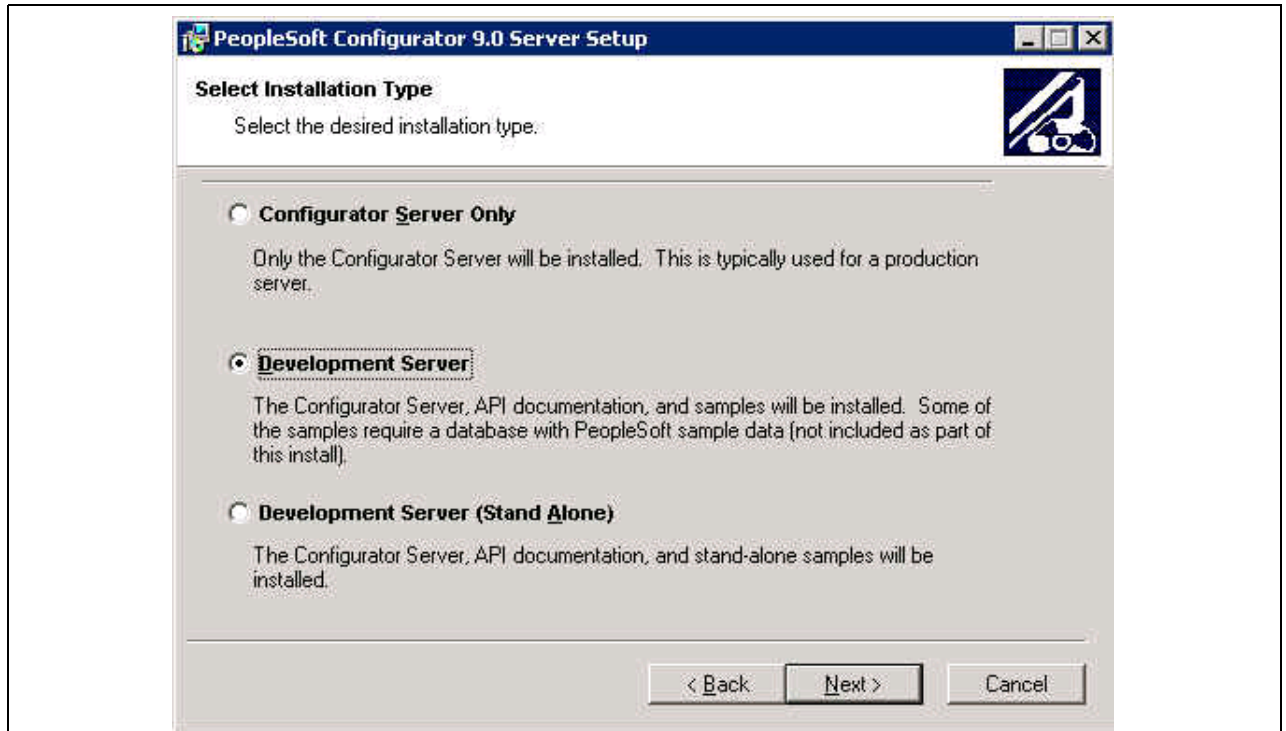
To install the PeopleSoft Enterprise Advanced Configurator Server:

1. If you have not already installed WebLogic, do so now.

See Installing the WebLogic Application Server.

**Note.** If you are installing the PeopleSoft Enterprise Advanced Configurator WebLogic server in addition to an existing WebLogic server used for another application, install it in a separate location, such as \bea\_cfg\ rather than the default \bea.

2. Navigate to \$PS\_HOME\setup\Advanced Configurator\Server\Windows.
3. Double-click setup.exe.
4. Select Next on the Welcome screen.
5. Accept the license agreement and click Next. The Select Installation Type dialog appears:



Select Installation Type dialog box

6. Choose an install option (see field definitions below) and click Next.

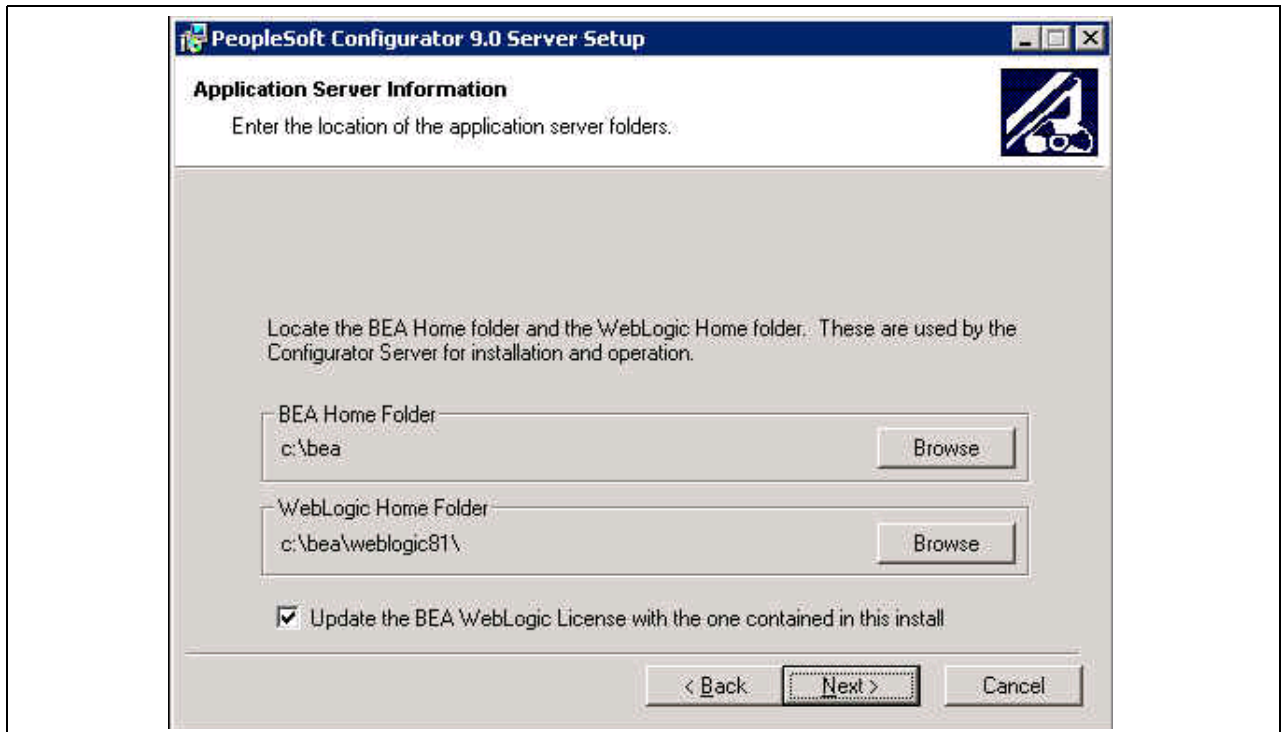
**Advanced Configurator Server**      Use to set up a production server.

**Development Server**      Use to view or develop using samples that pull data from a PeopleSoft CRM database.

**Development Server (Stand Alone)**      Use to view or develop using samples that do not require data from a PeopleSoft Enterprise CRM database.

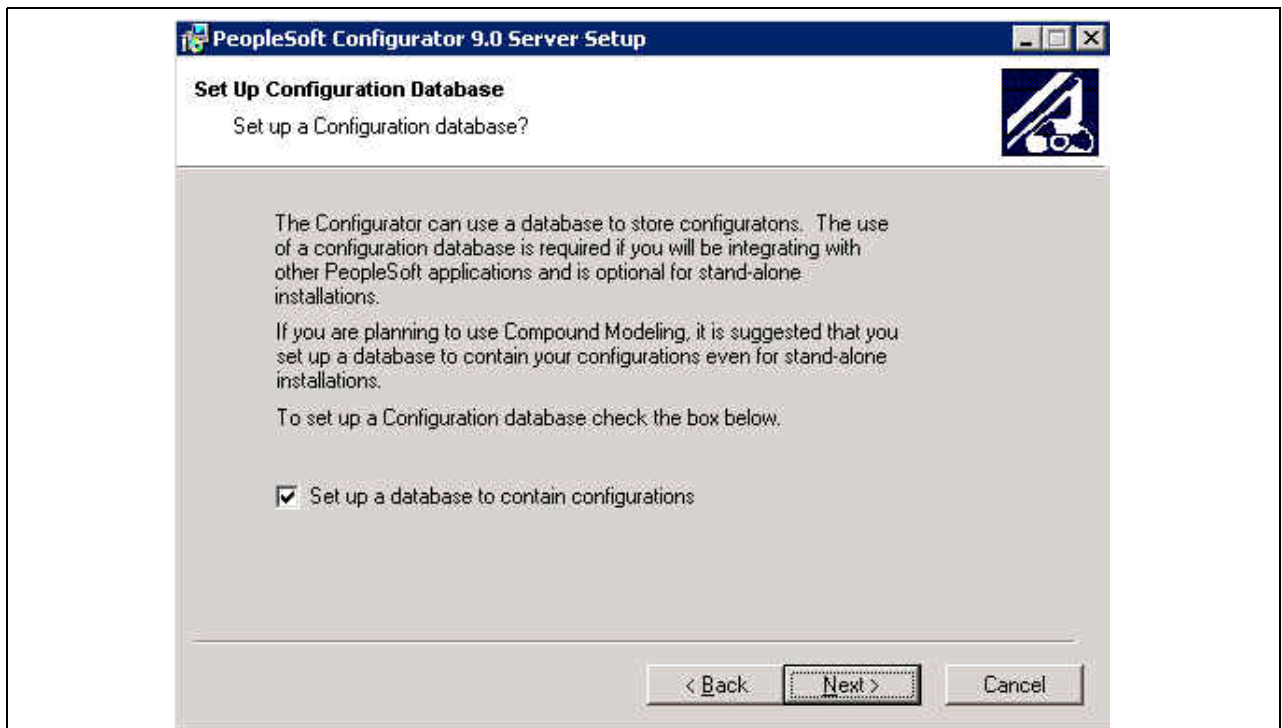
The User Information dialog box appears.

7. Select the option that allows the appropriate level of access to the PeopleSoft Enterprise Advanced Configurator Server to anyone who uses the machine or to anyone who uses the system ID that you logged in with.
8. Click Next. The Application Server Information dialog box appears:



Application Server Information dialog box

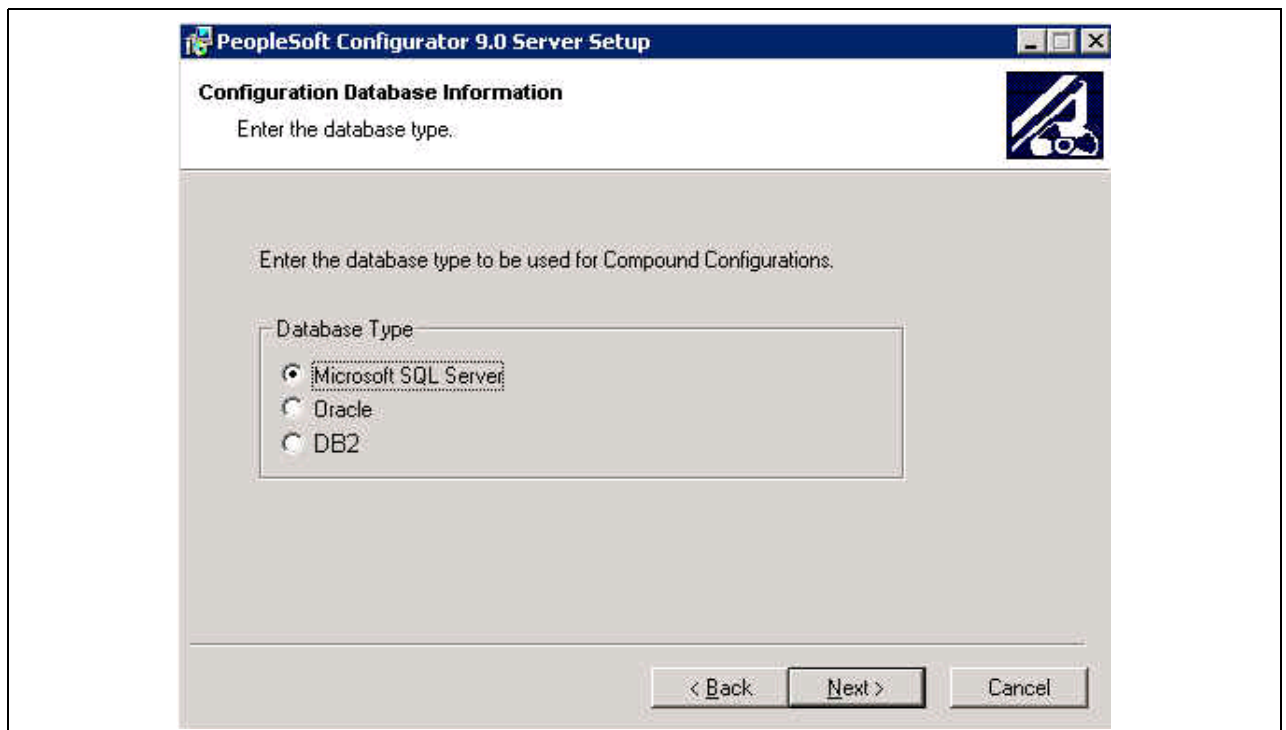
9. If you are using another directory for the WebLogic 8.1SP5 server, or if you are using an existing WebLogic 8.1SP5 installation with another application, select its location with the Browse buttons.
10. Click Next. The Set Up Configuration Database dialog box appears:



Set Up Configuration Database dialog box

11. Select the check box and click Next. The Configuration Database Information dialog box appears.

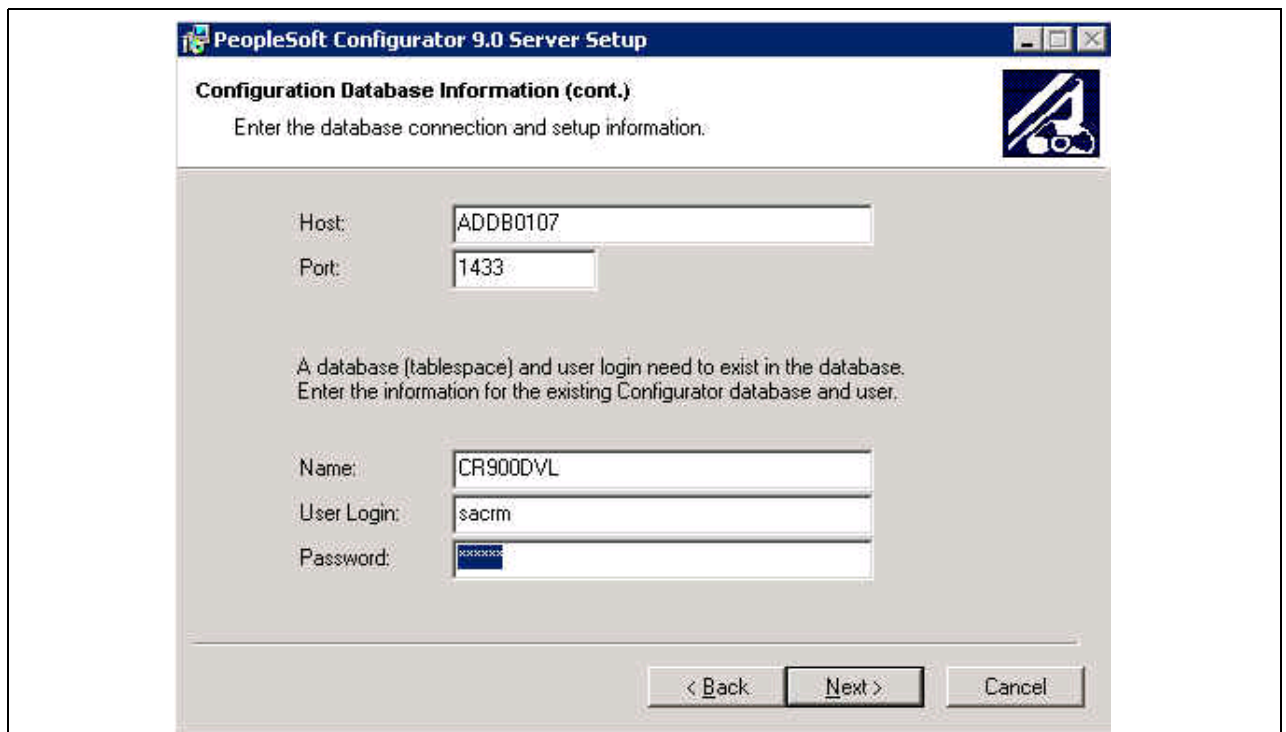
**Note.** For concurrent PeopleSoft Enterprise CRM installations, select Set up a database to contain configurations if you are integrating with other PeopleSoft applications.



The screenshot shows the 'Configuration Database Information' dialog box. The title bar reads 'PeopleSoft Configurator 9.0 Server Setup'. The main heading is 'Configuration Database Information' with a sub-instruction 'Enter the database type.'. Below this, another instruction says 'Enter the database type to be used for Compound Configurations.'. A group box labeled 'Database Type' contains three radio buttons: 'Microsoft SQL Server' (which is selected), 'Oracle', and 'DB2'. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

Configuration Database Information dialog box

12. Select the database that you are running. Click Next to continue this dialog.



The screenshot shows the 'Configuration Database Information (cont.)' dialog box. The title bar reads 'PeopleSoft Configurator 9.0 Server Setup'. The main heading is 'Configuration Database Information (cont.)' with a sub-instruction 'Enter the database connection and setup information.'. The form contains several input fields: 'Host' with the value 'ADDB0107', 'Port' with the value '1433', 'Name' with the value 'CR900DVL', 'User Login' with the value 'sacrm', and 'Password' with a masked value 'XXXXXXXXXX'. A text block below the fields states: 'A database (tablespace) and user login need to exist in the database. Enter the information for the existing Configurator database and user.'. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

Configuration Database Information (cont.) dialog box

13. Enter the database information for the database that you intend to use for configuration and model data.

For concurrent PeopleSoft Enterprise CRM installations: If you want to use the PeopleSoft Enterprise CRM database for PeopleSoft Enterprise Advanced Configurator data, enter the hostname and port for the server where it resides, and enter the system administrator login and password.

14. Click Next to complete the installation setup.

It is not necessary to reboot the system when installation is complete.

The Advanced Configurator Server installation creates the following directories:

- Directories found in:

\bea\weblogic81\config\CalicoDomain\applications\CalicoApp\Web-inf\:

- config\
- dtd\
- lib\
- logs\
- models\
- namodels\
- nastructures\
- sql\
- structures\
- xsd\

- Installation-specific files found in:

\bea\weblogic81\config\CalicoDomain\install\

- cpsampfiles.cmd
- install.jar
- install.properties
- installprops.log
- InstWLISVLic.cmd
- isv.jar
- license\_isv.bea
- propupdate.cmd

- The file installprops.log contains information about setup during installation (including error messages if any errors occurred). The system administrator can use propupdate.cmd and install.properties to rerun setup to aid in future troubleshooting or information gathering.
- For database connection pooling purposes, the t3servername property has been added to the LEDBAcc.properties file.

The t3servername property has a default value of 'myserver' upon install. If the weblogic 8.1 server is installed or reconfigured with a server name other than 'myserver' the t3servername property in LEDBAcc.properties needs to be updated to reflect the actual server name.

The LEDBAcc.properties file is located at: <Weblogic81\_Home>\config\CalicoDomain\applications\CalicoApp\Web-inf\config.

After the PeopleSoft Enterprise Advanced Configurator Server is installed, you can change the default WebLogic system password, as described in the next section.

## Task 9-2-2: Changing the WebLogic System Password

To change the WebLogic system password:

1. Select Start, Programs, PeopleSoft Applications, Configurator 9, Start Configurator Server to make sure PeopleSoft Enterprise Advanced Configurator server is running.
2. Go to the WebLogic management console by entering this URL in a browser:  
`http://<host_name>:7777/console`
3. Log in as user=system and password=<your password>
4. Click the Users link under Compatibility Security.
5. Under “Change a User’s Password” (to the far right side of the page), enter:

**Name** Enter the name of the system.

**Old Password** Enter *weblogic*.

**Confirm Password** <new password>

6. Click the Change button.
7. Click the link “The changes you have made must be saved to the realm implementation.”
8. Stop the PeopleSoft Enterprise Advanced Configurator Server by running `stopConfigurator.cmd` from the server prompt.
9. Locate `startConfigurator.cmd` and `stopConfigurator.cmd` in `\bea\weblogic81\config\CalicoDomain` and change `set WLS_PW=weblogic` to `set WLS_PW=<the new password>`
10. If you have configured the PeopleSoft Enterprise Advanced Configurator Server as a service, because you changed `startConfigurator.cmd`, you must reregister the service.

Execute the following commands from the directory where `startConfigurator.cmd` resides:

```
startConfigurator.cmd remservice
startConfigurator.cmd cfgservice
```

11. Check for the existence of `boot.properties`. (By default, it will be in `C:\bea\weblogic81\config\CalicoDomain`.) If the file is present, replace the password value with the unencrypted new password. Note that it will be encrypted upon boot up of the server
12. Restart the service from the Control Panel or reboot the system.

## Task 9-2-3: Uninstalling the Configuration Server

Before you uninstall the PeopleSoft Enterprise Advanced Configurator Server, first uninstall Visual Modeler, if it is present on the server. (Use the Add/Remove utility on the Control Panel to uninstall Visual Modeler.)

To uninstall the PeopleSoft Enterprise Configuration Server:

1. If you plan to reinstall after you uninstall, back up `startConfigurator.cmd` to preserve any changes made to the file in the course of development.

2. Use the Add/Remove Programs utility of Microsoft Windows to uninstall the PeopleSoft Enterprise Advanced Configurator Server.

If you are reinstalling and use a listen port other than 7777 for WebLogic, be sure to respecify the port, as the install process will reset it to the default of 7777.

---

## Task 9-3: Starting and Configuring the PeopleSoft Enterprise Advanced Configurator Server on Windows

This section discusses:

- Starting the PeopleSoft Enterprise Advanced Configurator Server on Windows
- Setting Up the Advanced Configurator to Run as a Service
- Running the PeopleSoft Enterprise Advanced Configurator as a Service
- Resetting the Port
- (Optional) Setting the XML Encoding Option

### Task 9-3-1: Starting the PeopleSoft Enterprise Advanced Configurator Server on Windows

After you have installed the WebLogic application server and the PeopleSoft Enterprise Advanced Configurator Server, you need to start the PeopleSoft Enterprise Advanced Configurator Server.

Starting the PeopleSoft Enterprise Advanced Configurator Server properly sets up the necessary system environment variables for the JDK/JRE, WebLogic 8.1SP5, and the PeopleSoft Enterprise Advanced Configurator Server.

You can start the PeopleSoft Enterprise Advanced Configurator Server in one of three ways:

- Select PeopleSoft Applications, Advanced Configurator, Advanced Configurator Server from the Start/Programs menu.
- Run the startConfigurator.cmd file within a command prompt or from Microsoft Windows.
- If the server is running as a Microsoft Windows service, use the Services utility.

### Task 9-3-2: Setting Up the Advanced Configurator to Run as a Service

After you have installed both the WebLogic server and the PeopleSoft Enterprise Advanced Configurator Server, you can set up PeopleSoft Enterprise Advanced Configurator Server to run as a service.

To set up the PeopleSoft Enterprise Advanced Configurator to run as a service:

1. Open a command prompt window.
2. At the prompt, change the directory to \bea\weblogic81\config\CalicoDomain, the WebLogic directory containing startConfigurator.cmd.
3. Run the startConfigurator cfgservice script with this command:



```
C:\bea\weblogic81\config\CalicoDomain > startConfigurator cfgservice
```

Running this script:

- Specifies the appropriate settings.
- Registers the server as a Windows Server service.
- Installs the WebLogic server as a service under the name “PeopleSoft Enterprise Advanced Configurator Server.”
- Queries the Windows Server Registry for the WebLogic installation location.
- Opens the Service Control Manager.
- Installs the service executable C:\bea\weblogic81\bin\beasvc.exe.

### Task 9-3-3: Running the PeopleSoft Enterprise Advanced Configurator as a Service

To run the PeopleSoft Enterprise Advanced Configurator as a service:

1. To start the service, either reboot the server (the service is set to automatic) or use the Control Panel utility.
2. Select Start, Settings, Control Panel, Administrative Tools, Services.
3. Look for “PeopleSoft Enterprise Advanced Configurator Server” in the list of services for the system.

---

**Note.** To remove the service, run `c:\bea\weblogic81\config\CalicoDomain > startConfigurator remservice`.

---

### Task 9-3-4: Resetting the Port

To change the server port:

1. Open the WebLogic administration console for the Calico Domain:  
`http://<hostname>:7777/console`
2. Select CalicoDomain, Servers, myserver.
3. On the General tab, enter a new value for Listen Port.
4. Click the Apply button.
5. Restart the PeopleSoft Enterprise Advanced Configurator Server.

### Task 9-3-5: (Optional) Setting the XML Encoding Option

Product configuration data created in a configuration session is formatted as XML code. Unless otherwise specified, restored data is encoded using the standard Unicode UTF-8 character set.

You can specify different encoding by adding an encoding parameter to the web.xml file.

---

**Note.** You should use the default UTF-8 or change the encoding to specify Internet Assigned Numbers Authority (IANA) encoding name.

---

To change XML output encoding:

1. Open the file web.xml file for editing located at:

C:\bea\weblogic81\config\CalicoDomain\applications\CalicoApp\Web-inf

2. Find the following lines in the XML file:

```
<servlet>
<servlet-name>copxml</servlet-name>
<servlet-class>com.calicotech.configurator.CopCom.COPXMLServlet.COPXMLServlet<=>
/servlet-class>
```

3. Create a new sub-element of the <servlet> element called <init-param>.

Other sub-elements called <init-param> may already exist; do not modify them. Input your desired encoding in the param-value element; Shift-JIS is used here as an example.

```
<init-param>
  <param-name>encoding</param-name>
  <param-value>Shift-JIS</param-value>
</init-param>
```

4. Save and close the file.
5. Restart the Advanced Configurator Server.

---

## Task 9-4: Installing the PeopleSoft Enterprise Advanced Configurator on Solaris

This section discusses:

- Understanding the PeopleSoft Enterprise Advanced Configurator Installation
- Setting Up the Database

### Understanding the PeopleSoft Enterprise Advanced Configurator Installation

This task provides you with reference information that is useful to know before installing this release of the PeopleSoft Enterprise Advanced Configurator Server.

For information about the minimum hardware, software, database, and client browser requirements that your system needs to meet to install this release on a Solaris system, see the CRM HWSW supplement.

See *PeopleSoft Enterprise CRM 9 Hardware and Software Requirements Guide*.

---

**Note.** The recommended product load order requires that WebLogic 8.1SP5 and the PeopleSoft Enterprise Advanced Configurator Server be loaded before any further Weblogic Service Packs are applied. PeopleSoft Enterprise Advanced Configurator Server may not work or even install properly if you do not follow this load order.

---

## Task 9-4-1: Setting Up the Database

If you plan to develop or deploy a compound model, set up the database for it before you install the PeopleSoft Enterprise Advanced Configurator Server. However, if you only need a database for external model data, you can set it up later.

---

**Note.** PeopleSoft Enterprise Advanced Configurator supports the UNICODE character set by default. See Task 9-4-1, “Setting the XML Encoding Option,” in this chapter for information on how to specify other character sets.

---

The database configuration information in this section is general in nature and assumes that you have already identified the type of database configuration you need. If not, you must contact your database administrator (DBA) for more information before installing and configuring your Oracle database and before installing the PeopleSoft Enterprise Advanced Configurator Server.

---

**Note.** This guide is not intended to replace the knowledge or assistance of an experienced Oracle DBA.

---

### *Database Server Requirements*

The database server can be a different system than the one where the PeopleSoft Enterprise Advanced Configurator Server components are installed.

The database server you use with the PeopleSoft Enterprise Advanced Configurator Server must meet the following requirements:

- Allow the database user account to make a minimum of 100 concurrent connections to the system.
- Support 50 dedicated concurrent connections.
- Set the value for the maximum number of extents for rollback segments to support 150 or more.

### *Database Configuration Requirements*

You must create a user account specifically for the PeopleSoft Enterprise Advanced Configurator Server, and the tablespace must be the default location for this user account. The System Identifier (SID) for the database account must have the necessary read-write permissions to create and drop tables or indexes and to insert, select, delete, or update any table in the dedicated tablespace.

Make a note of the tablespace, user ID (the Connect ID for PeopleSoft CRM applications), and password. You will need to refer to them during the PeopleSoft Enterprise Advanced Configurator Server installation.

---

## Task 9-5: Installing the WebLogic Application Server on Solaris

### Task 9-5-1: Installing WebLogic Application Server 8.1 SP5

You must install WebLogic 8.1SP5 from the PeopleSoft CRM CD-ROM set; do not use another installation of WebLogic 8.1SP5.

---

**Note.** For more detailed information, see <http://edocs.bea.com/platform/docs81/install/index.html>.

---

To install the WebLogic Application Server 8.1 SP5 on Solaris:

1. Make sure that you have created a WebLogic user account (the default user is “weblogic”), and verify that you can log on as the WebLogic user before you attempt to install WebLogic 8.1SP5.
2. Make sure that you have created a group for the WebLogic user (the default group is “weblogic”) and set permissions for it.

---

**Note.** Record the username and group permissions you use during setup. You may need to refer to them when you install the PeopleSoft Enterprise Advanced Configurator Server.

---

3. Change the directory to the AppSrvr/Solaris directory on the temp directory created in the task “Installing the PeopleSoft Enterprise Advanced Configurator Server.”
4. Execute *one* of the following:
  - \$ sh /platform815\_solaris32.bin (for GUI mode install)
  - \$ sh ./platform815\_solaris32.bin-mode=console (for console mode install)

After you have installed WebLogic 8.1SP5 for the Advanced Configurator on your system, all of their directory locations are mapped to variables used by the Advanced Configurator Server. These directory locations are important to the proper installation and operation of the Advanced Configurator Server.

After the Advanced Configurator Server is up and running, do not move JDK, JRE, or WebLogic files to another directory location. If you do, you must reinstall the Advanced Configurator Server.

## Task 9-5-2: Uninstalling the WebLogic Server

To uninstall WebLogic, you can either remove the entire bea directory (if WebLogic is the only BEA product installed) or use the WebLogic un-install utility.

For more information about this utility, see <http://edocs.bea.com/platform/docs81/install/uninstal.html#1035105>.

---

## Task 9-6: Installing the PeopleSoft Enterprise Advanced Configurator Server on Solaris

This section discusses:

- Installing the Advanced Configurator Server Installation on Solaris
- Changing the WebLogic System Password
- Uninstalling the PeopleSoft Enterprise Advanced Configurator Server

### Task 9-6-1: Installing the Advanced Configurator Server Installation on Solaris

This section describes the process for installing the Advanced Configurator Server on a Solaris system.

The installation of Advanced Configurator Server includes the optional creation of database tables. However, the database and connectivity must already exist. The database can be the PeopleSoft Enterprise CRM database if you are installing with other PeopleSoft Enterprise CRM applications.

Advanced Configurator Server installation allows you to specify the port number of the Advanced Configurator database if it is different from the default setting. Check with your DBA if you are not sure of the appropriate port setting.

---

**Note.** Before proceeding with the Advanced Configurator Server installation, install the custom Advanced Configurator database or PeopleSoft CRM database. Make sure the database has a user login with permission to create tables.

---

To install the Advanced Configurator Server on Solaris:

1. If WebLogic 8.1SP5 is not yet installed on the system, do so before proceeding. For more information, see the task “Installing the WebLogic Application Server on Solaris9,” which appears earlier in this chapter.

---

**Warning!** Do not install Advanced Configurator Server into the PeopleTools WebLogic application server.

---

2. Navigate to `$PS_HOME/setup/Advanced Configurator/Server/Solaris/` to run the Configurator Server script, `install.sh`.
3. Follow the instructions to install and configure the server and database connection.
  - If you want to use a license other than the one provided with the installation, you have the option to choose a PeopleSoft ISV license during installation.
  - You should update the license if you installed WebLogic from the PeopleSoft distribution CD. If you already have a running WebLogic installation and you are installing Advanced Configurator into it, you may not want to update the license. Check with your WebLogic administrator.
  - If you want to install a newer, supported WebLogic Service Pack, you may install it now.

---

**Note.** In this release, WebLogic 8.1SP5 installs JDK 1.4.2 in its directory structure. The default path to the JDK is `/$HOME/boa/weblogic81/jdk1.4.2_08`.

---

When installation is complete, these 13 new directories will appear under the directory `/$HOME/boa/weblogic81/config/CalicoDomain/applications/CalicoApp/`:

- `Web-inf/`
- `config/`
- `dtd/`
- `lib/`
- `logs/`
- `models/`
- `namodels/`
- `nastructures/`
- `sql/`
- `structures/`
- `xsd/`
- `web.xml`
- `weblogic.xml`

## Task 9-6-2: Changing the WebLogic System Password

You should change the WebLogic system password for production systems.

To change the default WebLogic system password:

1. Enter the following URL in a browser to open the WebLogic management console:

`http://<host_name>:7777/console`

2. Log in as user=*system*, and password=*<old WebLogic system password>*.
3. Click the User's link under Compatibility Security.
4. Under "Change a User's Password" (to the far right side of the page), enter:

<b>Name</b>	System
<b>Old Password</b>	<old WebLogic system password> ("weblogic" by default)
<b>Confirm Password</b>	<new WebLogic system password>

5. Click the Change button.
6. Click the link "The changes you have made must be saved to the realm implementation."
7. Stop the server.
8. Check for the existence of the boot.properties file. (By default, it will be in <WLHome>/config/CalicoDomain.) If the file is present, replace the password value with the unencrypted new password. Note that it will be encrypted upon boot up of the server.
9. In startConfigurator.sh and stopConfigurator.sh, change WLS\_PW=*<old WebLogic password>* to WLS\_PW=*<new password>*.
10. Restart the Configurator server.

## Task 9-6-3: Uninstalling the PeopleSoft Enterprise Advanced Configurator Server

To un-install the PeopleSoft Enterprise Advanced Configurator server:

1. Stop the Advanced Configurator Server.
2. Remove the <bea home>/weblogic81/config/CalicoDomain directory.

---

## Task 9-7: Starting and Configuring the PeopleSoft Enterprise Advanced Configurator Server on Solaris

### Understanding the Advanced Configurator Server Initiation on Solaris

After you have installed WebLogic 8.1SP5 and the Advanced Configurator Server, start the Advanced Configurator Server. A startup script file, `startConfigurator.sh`, is provided.

You can call `startConfigurator.sh` in these two ways:

- Manually by issuing the `startConfigurator.sh` command on the command line.
- Automatically by using the Solaris daemon to start this script file once the system is running.

When the `startConfigurator.sh` script file is called, it sets up all the necessary system environment variables for the WebLogic server, the JDK, and the Advanced Configurator Server.

The `startConfigurator.sh` script file performs the following tasks for you:

- Sets the appropriate system variables for the JDK.
- Sets the appropriate system variables for the Advanced Configurator Server.
- Defines a Java classpath for WebLogic.
- Starts the PeopleSoft Enterprise Advanced Configurator Server.

## Task 9-7-1: Starting the Advanced Configurator Server from the Command Line

To start the PeopleSoft Enterprise Advanced Configurator server from the command line:

1. Log in as the WebLogic user.
2. Change directory to the location of the Advanced Configurator Server using this command:

```
# cd /$HOME/psft/psft81/config/CalicoDomain
```

3. Start the script file by using this command:

```
./startConfigurator.sh
```

The script starts the Advanced Configurator Server.

---

**Note.** To start and run the server in the background, use the command `nohup ./startConfigurator.sh &`

---

## Task 9-7-2: Stopping the Script File from the Command Line

To stop the `startConfigurator` script file from the command line:

1. Log in as the WebLogic user.
2. Change directory to the location of the Advanced Configurator Server using this command:

```
# cd /$HOME/psft/psft81/config/CalicoDomain
```

3. Start the script file with the command:

```
/stopConfigurator.sh
```

This stops the Advanced Configurator Server.

## Task 9-7-3: Starting the Advanced Configurator Server Automatically

To set up the Advanced Configurator Server to start automatically when the Solaris system starts:

1. Log in as root.

2. Create a file called `Advanced Configurator_ctl` in `/etc/init.d`. The file looks like this (with `CONFIG_HOME` modified as needed for your system):

```
#!/sbin/sh
CONFIG_HOME=/${HOME}/bea/weblogic81/config/CalicoDomain
case "$1" in
  'start')
    echo 'starting Advanced Configurator Server.'
    su - weblogic -c "cd $CONFIG_HOME; ./startConfigurator.sh 1>/dev/null 2>&1" &
    ;;
  'stop')
    echo 'stopping Advanced Configurator Server.'
    su - weblogic -c "cd $CONFIG_HOME; ./stopConfigurator.sh 1>/dev/null 2>&1" &
    ;;
  *)
    echo "Usage $0 { start | stop }"
    ;;
exit 0
```

3. Link the `Advanced Configurator_ctl` file to the `/etc/rc 3.d` directory:

```
# ln Advanced Configurator_ctl /etc/rc3.d/K99configurator
# ln Advanced Configurator_ctl /etc/rc3.d/S99configurator
```

## Task 9-7-4: Resetting the Port

To change the server port:

1. Open the WebLogic Administration console for the Calico Domain:  
(<http://<hostname>:7777/console>).
2. Select CalicoDomain, Servers, myserver.
3. On the General tab, enter a new value for Listen Port.
4. Click the Apply button and restart the Advanced Configurator Server.

## Task 9-7-5: (Optional) Setting the XML Encoding Option

Product configuration data created in a configuration session is formatted as XML code. Unless otherwise specified, restored data is encoded using the standard Unicode UTF-8 character set.

You can specify different encoding by adding an encoding parameter in the solution using the WebLogic Console.

---

**Note.** You should use the default UTF-8 or change the encoding to specify Internet Assigned Numbers Authority (IANA) encoding name.

---

To change XML output encoding:

1. Open the file `web.xml` for editing. It is located at:  
`/${HOME}/bea/weblogic81/config/CalicoDomain/applications/CalicoApp/Web-inf`
2. Locate these lines in the XML file:



```
<servlet>
  <servlet-name>copxml</servlet-name>
  <servlet-class>com.calicotech.configurator.CopCom.COPXMLServlet.COPXMLServlet</
servlet-class>
```

3. Create a new sub-element of the <servlet> element called <init-param>.

Other sub-elements called <init-param> may already exist; do not modify them. Input the desired encoding in the param-value element; Shift-JIS is used here as an example:

```
<init-param>
  <param-name>encoding</param-name>
  <param-value>Shift-JIS</param-value>
</init-param>
```

4. Save and close the file.
5. Restart the Advanced Configurator Server.

---

## Task 9-8: Installing the PeopleSoft Visual Modeler

This section discusses:

- Understanding the PeopleSoft Visual Modeler
- Installing the Visual Modeler on Windows
- Uninstalling the PeopleSoft Visual Modeler

### Understanding the PeopleSoft Visual Modeler

The PeopleSoft® Visual Modeler™ is a hierarchical modeling tool for designing complex configuration solutions. Model data can be defined in the model or obtained from a relational database.

The PeopleSoft Visual Modeler is designed for use in a Microsoft Windows environment.

To compile a model, the Visual Modeler needs access to an Advanced Configurator Server, which can be local or remote.

In addition, if model data is stored externally in a database, you can specify the connection in Visual Modeler. This section describes some of the information you need to gather before installing Visual Modeler.

For information on the hardware and software requirements for Visual Modeler, see the *PeopleSoft Enterprise CRM 9 Hardware and Software Requirements Guide*.

See *PeopleSoft Enterprise CRM 9 Hardware and Software Requirements Guide*.

*Supported Databases:*

Use of the Visual Modeler does not require a database installed on your system. However, if you want to use external data within your models, the Visual Modeler supports the same databases as Advanced Configurator Server (see prerequisites).

## Task 9-8-1: Installing the Visual Modeler on Windows

To install the Visual Modeler:

1. If WebLogic 8.1SP5 or the Advanced Configurator Server is not yet installed on a server, do so now before proceeding.
2. Log in as Windows Administrator or as a user with administrative privileges.
3. Insert the CRM 9 CD-ROM in the drive (of a Microsoft Windows machine).
4. Double-click `setup.exe` to launch the installation.
5. Click Next.

The License Agreement dialog box appears.

6. Accept the license agreement and click Next.

The Select Database dialog box appears.

7. Select the type of database you will be using.
8. If you are prompted to select Unicode or non-Unicode; choose appropriately according to your database setup.

The Server Selection dialog box appears.

9. If you are installing only Advanced Configurator, select only PeopleSoft File Server. Otherwise, select PeopleSoft File Server and any other PeopleSoft servers you want to install.

The Directory Selection dialog box appears.

10. Choose the directory in which to install the Visual Modeler installer.

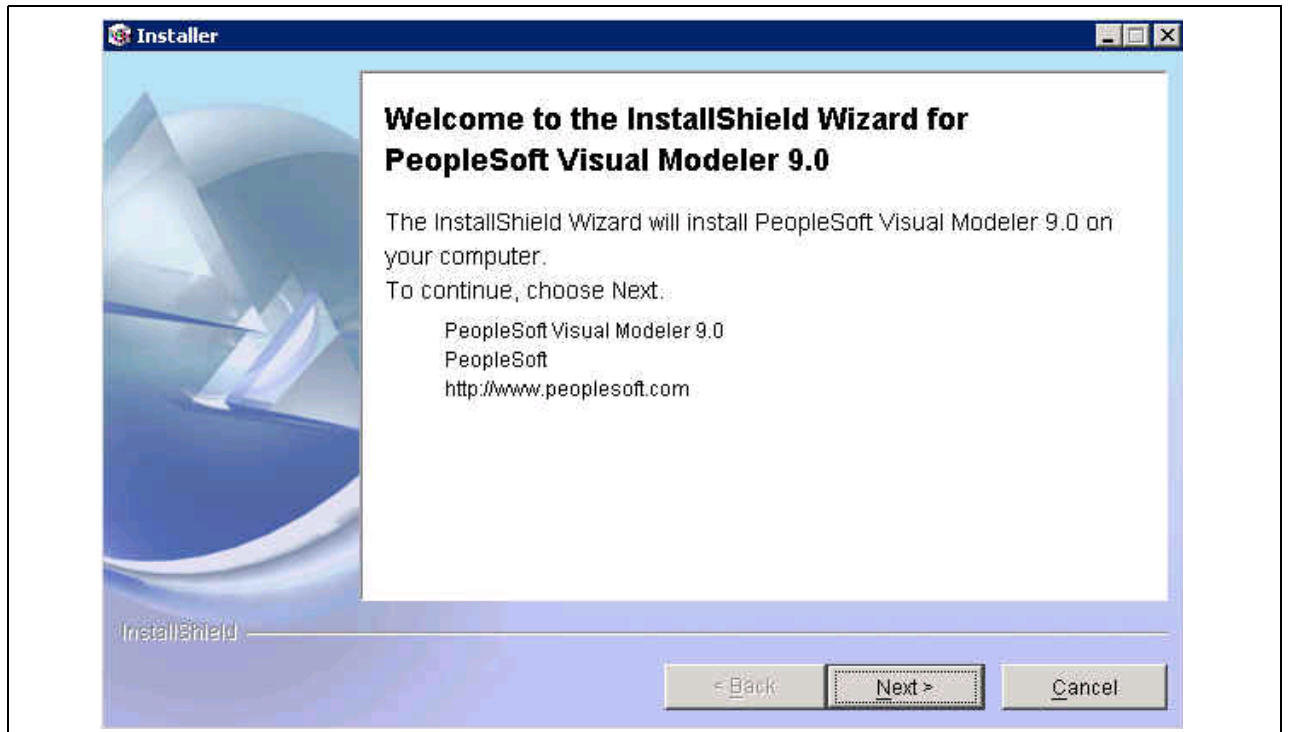
The Product Selection dialog box appears.

11. If you want to install only Advanced Configurator, clear the check boxes of all products except PeopleSoft Advanced Configurator. Otherwise, select PeopleSoft Advanced Configurator and any other products you want to install.

The PeopleSoft Visual Modeler installer is copied to the directory you specified earlier.

12. Navigate to that directory and, within it, navigate to `$PS_HOME/setup/Advanced Configurator/ViM`.
13. Double-click `VisualModeler_setup.exe` to launch the installation.

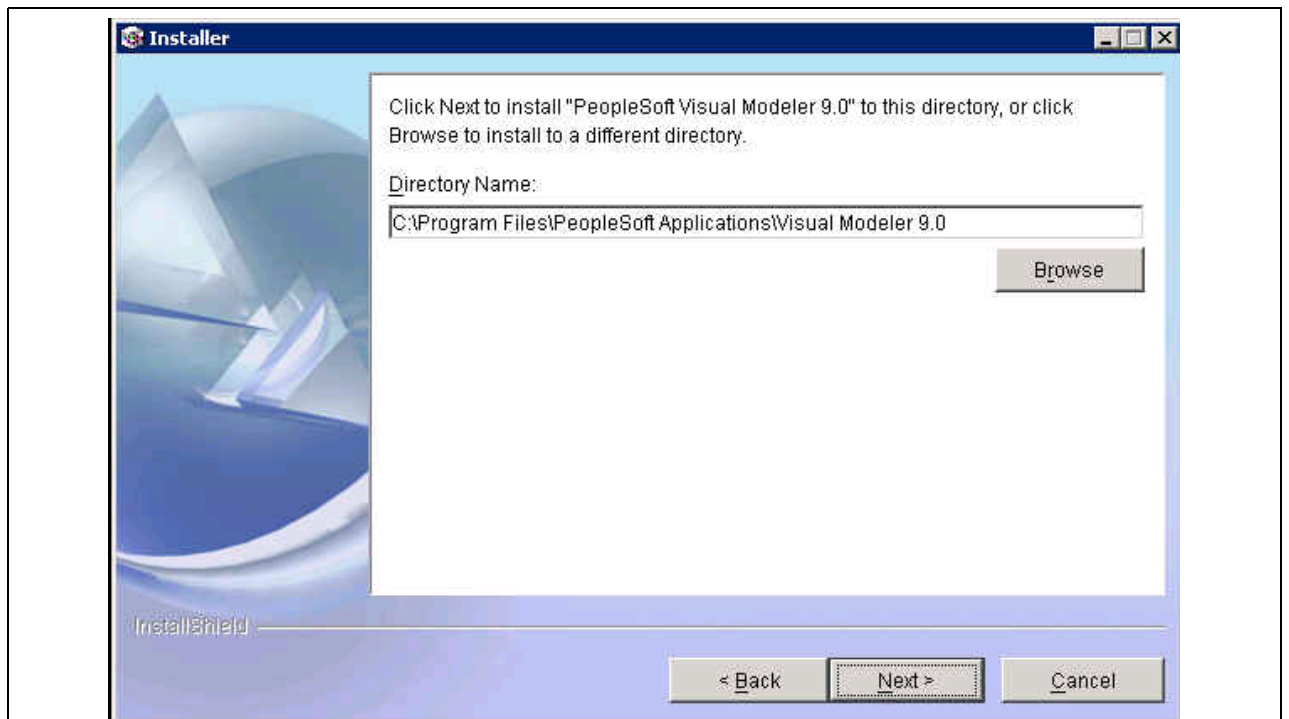
The Welcome screen appears:



Visual Modeler InstallShield Wizard dialog box

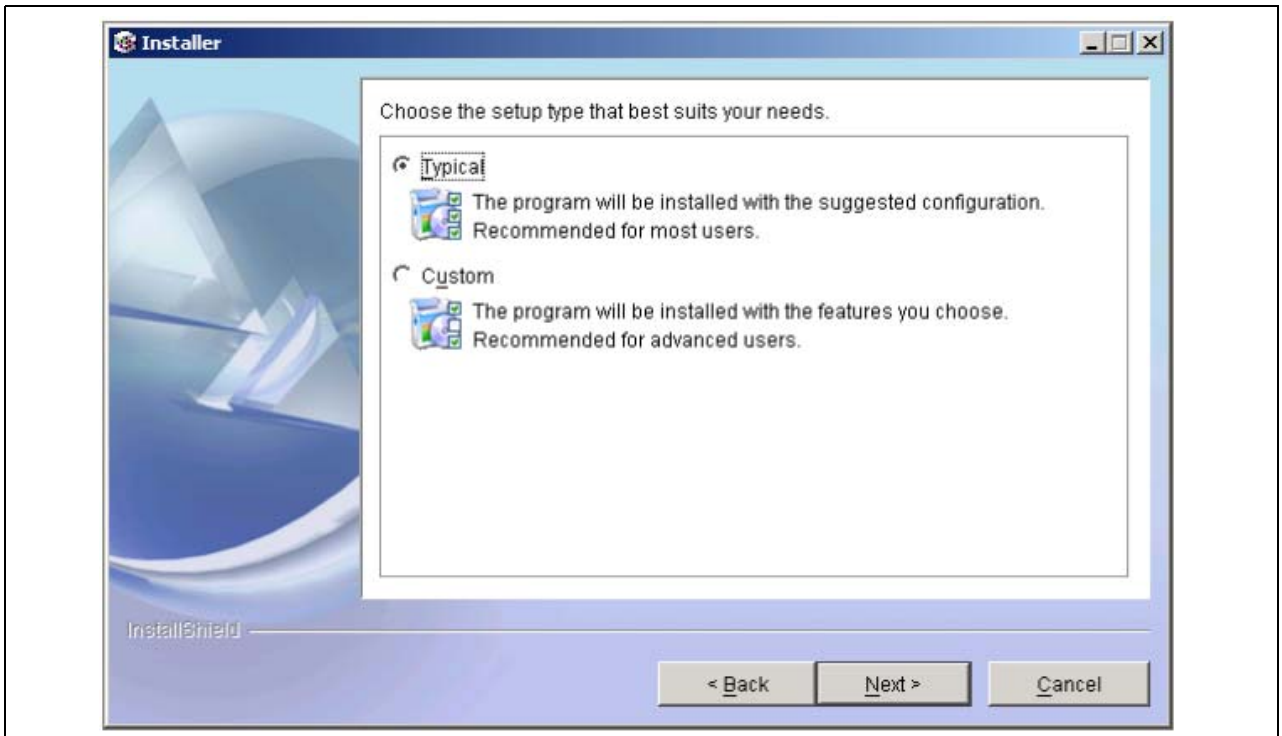
14. Click Next.

The License agreement dialog appears. By default, files are installed in C:\Program Files\PeopleSoft Applications\Visual Modeler 9.



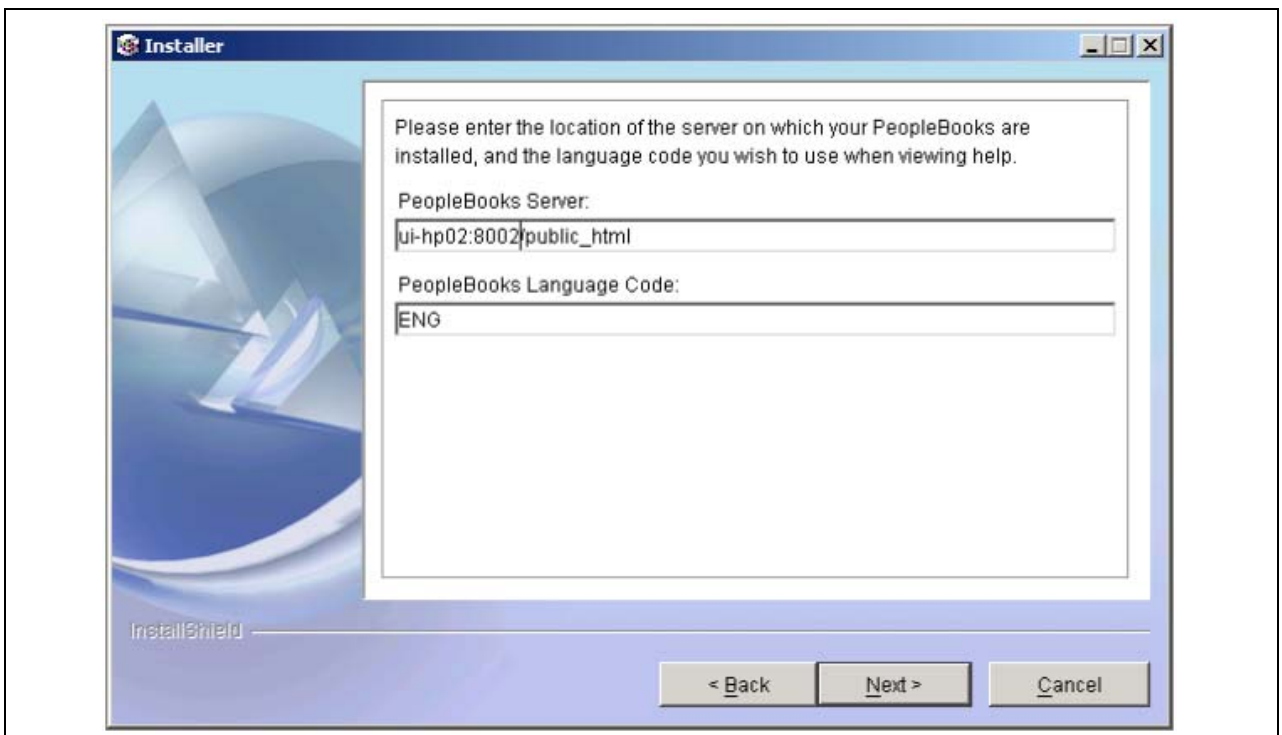
Visual Modeler Installer dialog box - Directory selection

15. Select Typical or Custom install:



Visual Modeler Installer dialog box - Setup type selection

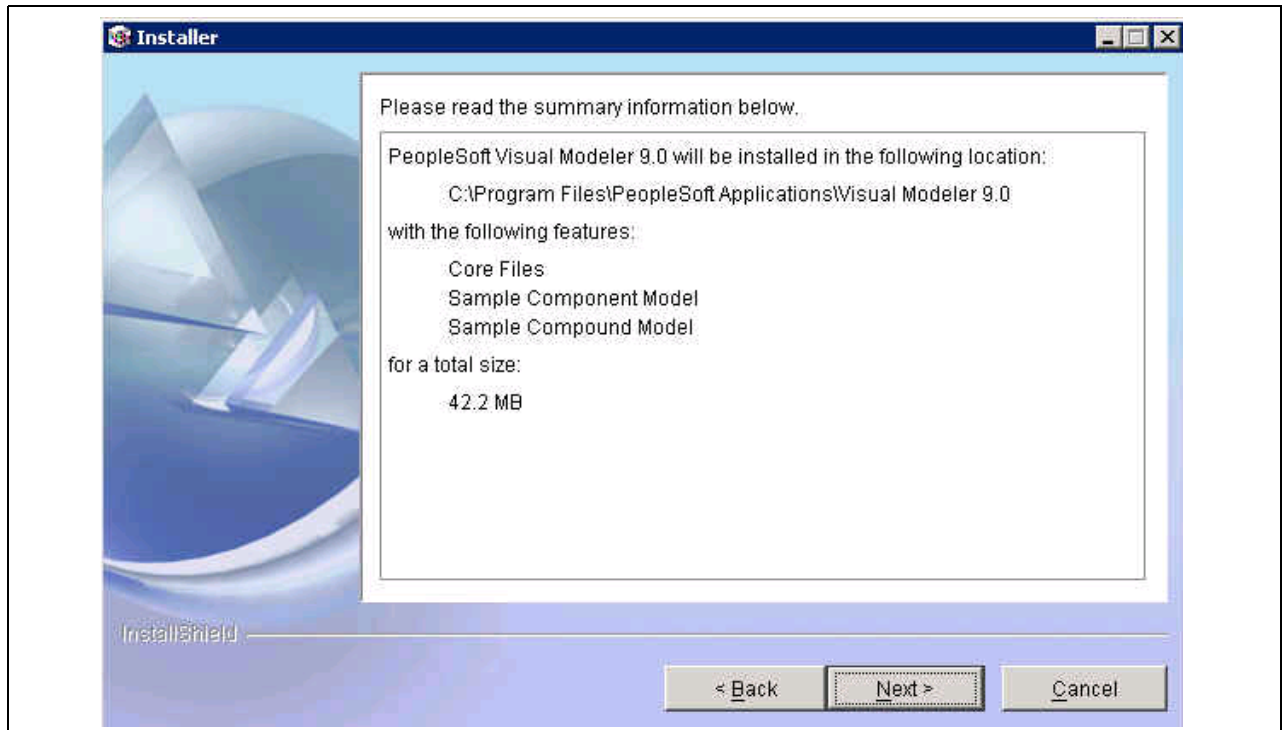
16. Enter the location of the server on which PeopleBooks are installed:



Visual Modeler Installer dialog box - specify PeopleBooks server

17. Click Next.

The Summary Information Dialog appears:



Visual Modeler Installer dialog box - Summary

18. Click Next to continue.

Installation begins.

---

**Note.** You do not need to reboot the system when the installation is finished.

---

## Task 9-8-2: Uninstalling the PeopleSoft Visual Modeler

Use the Add/Remove Programs utility on the Control Panel to uninstall Visual Modeler. The uninstall program removes the Visual Modeler files from your system. Files generated while using the product remain intact.

---

## Task 9-9: Installing for Integration to PeopleSoft Enterprise Order Capture

This section discusses:

- Understanding the Integration of Advanced Configurator with Order Capture
- Reviewing the Recommended Architecture for PeopleSoft Enterprise Advanced Configurator Integration with PeopleSoft Enterprise Order Capture
- Installing the PeopleSoft Advanced Configurator for Integration with Order Capture
- Setting Up a Proxy to the PeopleSoft Configuration Server for Integration

## Understanding the Integration of Advanced Configurator with Order Capture

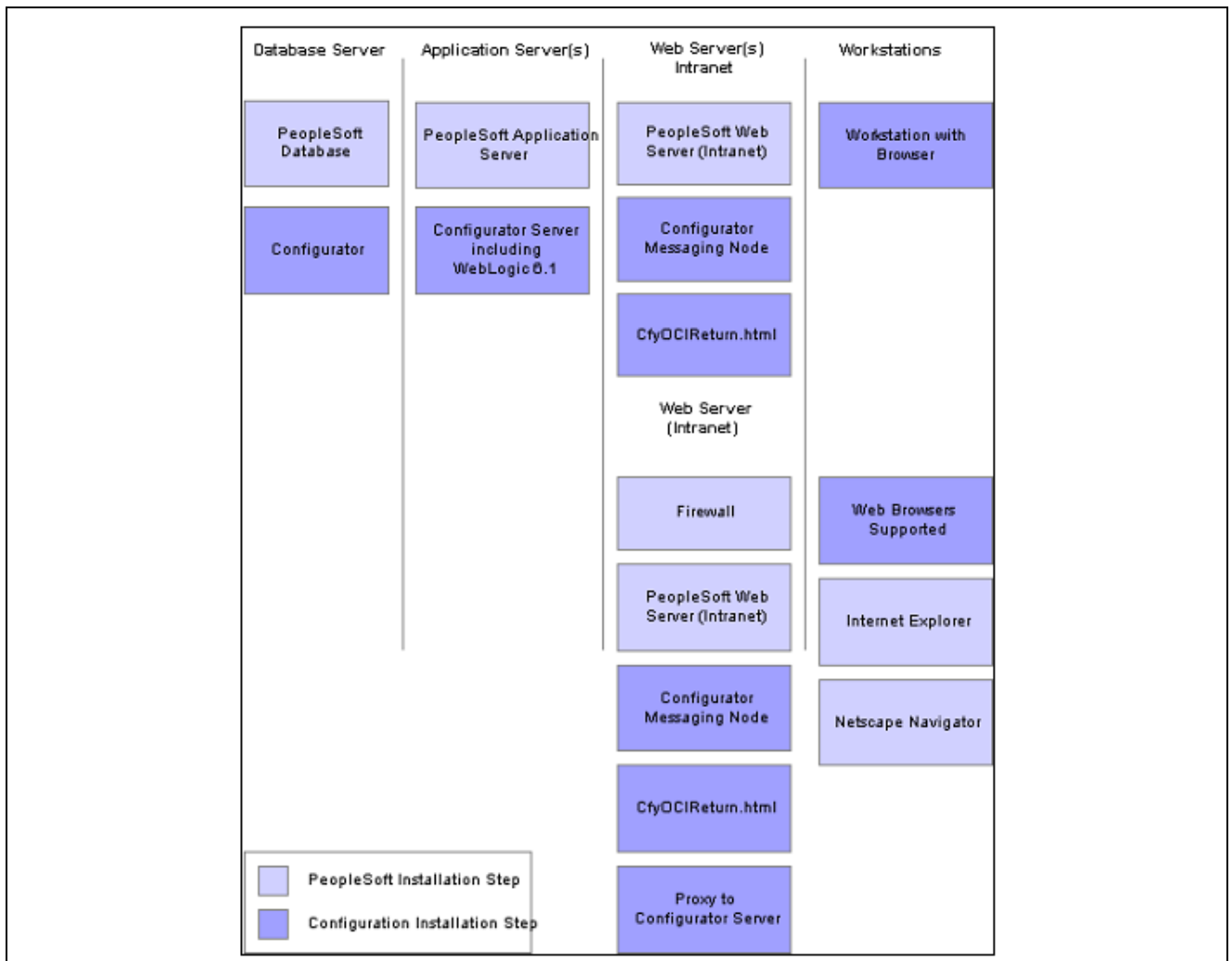
This section describes how to install and set up the components necessary to integrate the PeopleSoft Enterprise Advanced Configurator web application with PeopleSoft Enterprise Order Capture. Once setup is complete, a user creating an order can launch a configuration session from an order entry line, configure a product, and return to the Order Capture page with the updated product information.

The general steps necessary to integrate the PeopleSoft Enterprise Advanced Configurator web application with PeopleSoft Enterprise Order Capture are:

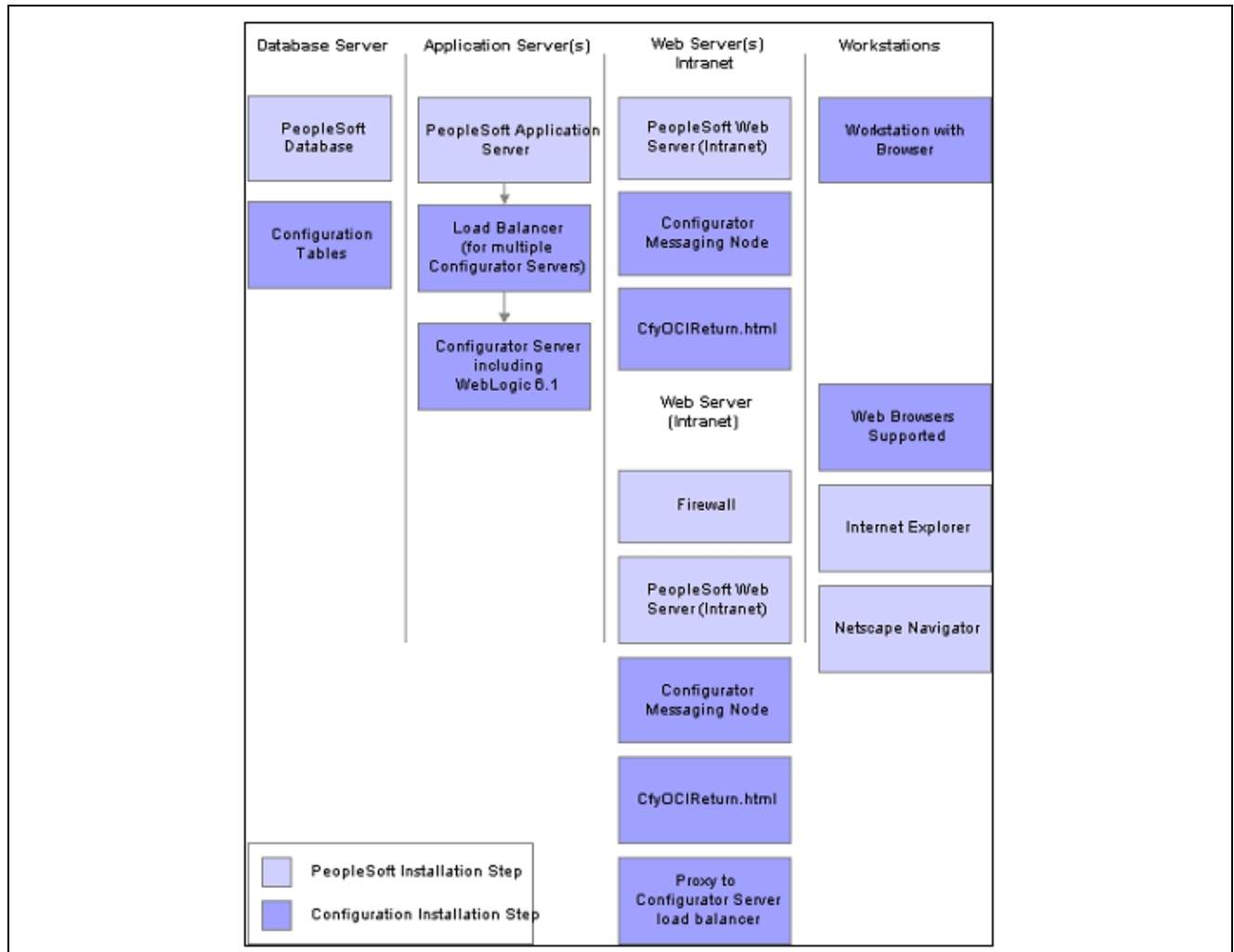
1. Install the WebLogic application server for Advanced Configurator.
2. Install the Advanced Configurator Server.
3. Set up the Advanced Configurator Server.
4. Set up proxy servers, if required.

### Task 9-9-1: Reviewing the Recommended Architecture for PeopleSoft Enterprise Advanced Configurator Integration with PeopleSoft Enterprise Order Capture

The following diagrams represent the recommended architecture:



Recommended architecture for low-volume environments



Recommended architecture for high-volume environments

## Task 9-9-2: Installing the PeopleSoft Advanced Configurator for Integration with Order Capture

To install PeopleSoft Advanced Configurator for integration with Order Capture:

1. Install your PeopleTools-based CRM system, including the WebServer, Appserver and Database.
2. Set up a working Integration Broker Server per the PeopleTools documentation.
3. Install BEA WebLogic Server 8.1SP5 (as above).

**Note.** You should install BEA WebLogic Server 8.1SP5 for the Advanced Configurator Server in a separate BEA instance on your PeopleSoft web server (for example, c:\bea\_cfg instead of the default c:\bea) to ensure that the correct version of the BEA application server is used for your Advanced Configurator Server. For better performance, you can install the Advanced Configurator Server on a separate application server from your PeopleSoft PeopleTools-based web server. You can also use a load balancer to add additional Advanced Configurator Servers to the system.

4. Install the PeopleSoft Enterprise Advanced Configurator Server on your web server (as above).



---

**Note.** When running the PeopleSoft Enterprise Advanced Configurator installation, you must select the option to set up a database to contain configurations. Enter the database connectivity information for your CRM database.

---

5. If required, set up a proxy to the PeopleSoft Enterprise Advanced Configurator Server.
6. On your CRM system, navigate to PeopleTools, Integration Broker, Integration Setup, Nodes.
7. Search for and select the “PSFT\_CFG” node.
8. Click the Connectors tab.
9. Edit the “PRIMARYURL” property and replace “<<configserver>>” with your server name (note that you delete the “<” and “>” also so that the resulting URL look like this: “http://uipd003.peoplesoft.com:7777/copxml”)

### Task 9-9-3: Setting Up a Proxy to the PeopleSoft Configuration Server for Integration

For implementations that use a PeopleSoft Web Server outside a firewall, an additional installation step is required.

By default, the Advanced Configurator Server is set up to listen on port 7777. Most implementations will not open this port in the firewall, so any requests that contain 7777 in their URL (for example, http://ps\_config\_server\_ip:7777/copxml) will result in an error indicating that the page can’t be found.

The solution is to proxy (that is, redirect) certain requests from the PeopleSoft Web Server that is outside the firewall to the PeopleSoft Advanced Configurator Server inside the firewall. When the PeopleSoft Web Server receives a request with a URL known to the proxy setup, it will redirect the request to the PeopleSoft Advanced Configurator Server.

For example, a request of http://ps\_web\_server\_ip/copxml will be redirected to the PeopleSoft Advanced Configurator Server. The 7777 suffix is not included in the URL, so no issues with firewall permission are raised.

The following URLs require proxy setup in an installation of a PeopleSoft Web Server outside a firewall:

- http://ps\_config\_server\_ip:7777/copxml
- http://ps\_config\_server\_ip:7777/solutions/\*
- http://ps\_config\_server\_ip:7777/calico/\*
- http://ps\_config\_server\_ip:7777/solutionlist
- http://ps\_config\_server\_ip:7777/ConfigServerInfo/\*

#### *Example Proxy Setup for WebLogic Server*

Insert the following text into the web.xml file for the PeopleSoft Web Server (the default location is c:\bea\weblogic81\config\peoplesoft\applications\PORTAL\WEB-INF\web.xml):

```
<!-- Advanced Configurator Server Proxy Start -->
<servlet>
<servlet-name>ProxyServlet</servlet-name>
<servlet-class>weblogic.t3.srvr.HttpProxyServlet</servlet-class>
<init-param>
<param-name>redirectURL</param-name>
```

```

<param-value>http://ps_config_server_ip:7777</param-value>
</init-param>
</servlet>
<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>
<url-pattern>/solutions/*</url-pattern>
</servlet-mapping>
<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>
<url-pattern>/calico/*</url-pattern>
</servlet-mapping>
<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>
<url-pattern>/copxml</url-pattern>
</servlet-mapping>
<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>
<url-pattern>/solutionlist</url-pattern>
</servlet-mapping>
<!-- Advanced Configurator Server Proxy End -->

```

---

**Note.** The following section maps a Solutions directory. All solutions should be installed under this directory:

```

<servlet-mapping>
<servlet-name>ProxyServlet</servlet-name>

<url-pattern>/solutions/*</url-pattern>
</servlet-mapping>

```

---

## Task 9-10: (Optional) Installing Multiple Configurator Instances on Windows

This section discusses:

- Using Multiple WebLogic Installs
- Using a Single WebLogic Install

The Configurator 9 installer for Windows only allows one instance to be installed per machine. However, multiple instances may be created by executing a few manual steps. You can install multiple instances in two ways: using multiple WebLogic installs and using a single WebLogic install. In both cases, the basic procedure is to run the installer to create the first installation and then copy the %BEA\_HOME%\weblogic81\config\CalicoDomain directory.

### Task 9-10-1: Using Multiple WebLogic Installs

To install multiple Configurator Instances on Windows using multiple WebLogic installs:

1. Run the WebLogic installer again. Be sure to select the option to create a new BEA home.

2. Copy the CalicoDomain directory to the new BEA home (BEA\_HOME\_2). `xcopy %BEA_HOME_1%\weblogic81\config\CalicoDomain %BEA_HOME_2%\weblogic81\config\CalicoDomain /E /I`
3. Edit `%BEA_HOME_2%\weblogic81\config\CalicoDomain\startConfigurator.cmd` and `%BEA_HOME_2%\weblogic81\config\CalicoDomain\stopConfigurator.cmd`. Change BEA\_HOME and WL\_HOME to reflect the new location.
4. Edit `%BEA_HOME_2%\weblogic81\config\CalicoDomain\install\propupdate.cmd` and change all occurrences of the BEA\_HOME\_1 directory to BEA\_HOME\_2. If you do not need to run both instances at the same time, you can stop here. Otherwise, continue with steps 5 through 7 to change the listen port. The example steps show changing the port to 7001, but you can use any port number you choose.
5. Edit `%BEA_HOME_2%\weblogic81\config\CalicoDomain\config.xml`. Change `ListenPort="7777"` to `ListenPort="7001"`.
6. Edit `%BEA_HOME_2%\weblogic81\config\CalicoDomain\stopConfigurator.cmd`. Change `-url localhost:7777` to `-url localhost:7001`.
7. Edit `%BEA_HOME%\weblogic81\config\CalicoDomain2\applications\CalicoApp\WEB-INF\config\LEDBAcc.properties`. Change all occurrences of 7777 to 7001. If you also need to run both instances as services at the same time, then continue to step 8 to change the service name. In the example, the name is changed to Configurator Instance 2, but you can choose any name that does not conflict with an existing service.
8. Edit `%BEA_HOME_2%\weblogic81\config\CalicoDomain\startConfigurator.cmd`. Change `SERVICE_NAME=PeopleSoft Configurator Server` to `SERVICE_NAME=Configurator Instance`.

## Task 9-10-2: Using a Single WebLogic Install

Creating multiple Configurator instances within the same WebLogic installation is similar to the process with multiple WebLogic installations. The key difference is that each instance must have a unique domain name.

To install multiple Configurator Instances on Windows using multiple WebLogic installs:

1. Copy the CalicoDomain directory. The target directory name will be the name of the new domain: `xcopy %BEA_HOME%\weblogic81\config\CalicoDomain %BEA_HOME%\weblogic81\config\CalicoDomain2 /E /I`  
Steps 2 through 5 will complete the domain name change for the new instance.
2. Edit `%BEA_HOME%\weblogic81\config\CalicoDomain\config.xml` and change all occurrences of CalicoDomain to CalicoDomain2.
3. Edit `%BEA_HOME%\weblogic81\config\CalicoDomain\startConfigurator.cmd` and change all occurrences of CalicoDomain to CalicoDomain2.
4. Edit `%BEA_HOME%\weblogic81\config\CalicoDomain\stopConfigurator.cmd` and change all occurrences of CalicoDomain to CalicoDomain2.
5. Edit `%BEA_HOME_2%\weblogic81\config\CalicoDomain\install\propupdate.cmd` and change all occurrences of CalicoDomain to CalicoDomain2. If you do not need to run both instances at the same time, you can stop here. Otherwise, continue with steps 6 through 8 to change the listen port. The example steps show changing the port to 7001, but you can use any port number you choose.
6. Edit `%BEA_HOME%\weblogic81\config\CalicoDomain2\config.xml`. Change `ListenPort="7777"` to `ListenPort="7001"`.
7. Edit `%BEA_HOME%\weblogic81\config\CalicoDomain2\stopConfigurator.cmd`. Change `-url localhost:7777` to `-url localhost:7001`.

8. Edit %BEA\_HOME%/weblogic81/config/CalicoDomain2/applications/CalicoApp/WEB-INF/config/LEDBAcc.properties. Change all occurrences of 7777 to 7001. If you also need to run both instances as services at the same time, then continue to step 9 to change the service name. In the example, the name is changed to Configurator Instance 2, but you can choose any name that does not conflict with an existing service.
9. Edit %BEA\_HOME%\weblogic81\config\CalicoDomain2\startConfigurator.cmd and change set SERVICE\_NAME=PeopleSoft Configurator Server to set SERVICE\_NAME=Configurator Instance 2.

## CHAPTER 10

# Installing PeopleSoft Enterprise Infosync 9

This chapter discusses:

- Prerequisites
- Installing the PeopleSoft Update Required for Install
- Installing the PeopleSoft Enterprise Infosync Server and Client 9 CD
- Preparing for Installation
- Preparing the PeopleSoft Enterprise Infosync Server for Domino
- Preparing the PeopleSoft Enterprise Infosync Server for Exchange
- Setting Up the PeopleSoft Integration Broker
- Installing the PeopleSoft Enterprise Infosync Server
- Setting Up PeopleSoft Enterprise CRM Access
- Exporting Users from PeopleSoft Enterprise CRM to the PeopleSoft Enterprise Infosync Server
- Importing Users into the PeopleSoft Enterprise Infosync Server
- Preparing for the PeopleSoft Enterprise Infosync Client Installation
- Installing the PeopleSoft Enterprise Infosync Client
- Running the PeopleSoft Enterprise Infosync Client

---

**Note.** Before proceeding with your installation, check PeopleSoft Customer Connection to ensure that you have the latest version of the following documents: Enterprise PeopleTools 8.48 Installation guide for your database platform, and PeopleSoft Enterprise PeopleTools 8.48 PeopleBooks.

---

---

**Note.** In addition, you should consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on the PeopleSoft Customer Connection website to determine what PeopleBooks you should include in your installation for the PeopleSoft Enterprise CRM products that you are implementing.

---

## Prerequisites

This document explains how to install and configure Oracle's PeopleSoft Enterprise Infosync 9.

You must install Oracle's PeopleSoft Enterprise PeopleTools and Oracle's PeopleSoft Enterprise CRM 9 applications before you continue with the PeopleSoft Enterprise Infosync 9 installation. PeopleSoft Enterprise Infosync 9 supports PeopleSoft Enterprise CRM 8.4 SP1, 8.8 SP1, and 8.9 SP1 application databases.

---

## Task 10-1: Installing the PeopleSoft Update Required for Install

To apply the PeopleSoft update required for install:

1. Go to Customer Connection to download the PeopleSoft Update Required for Install.
2. Implement the corresponding PeopleSoft Update ID to the CRM Application Database version you have installed. Please review all of the prerequisites and make sure that the prerequisites are fulfilled as well.

PeopleSoft CRM Application Database	PeopleSoft Update Required for Install
CRM 8.9 SP1 Database	Update ID 649341
CRM 8.8 SP1 Database	Update ID 649460
CRM 8.4 SP1 Database	Update ID 649461

---

## Task 10-2: Installing the PeopleSoft Enterprise Infosync Server and Client 9 CD

To install the PeopleSoft Enterprise Infosync Server and Client 9:

1. Locate setup.exe on the CRM9 CD for PeopleSoft Enterprise.
2. Proceed through the installation dialog boxes and select the desired installation options for Infosync server and client.

---

## Task 10-3: Preparing for Installation

### Understanding Knowledge and Skill Requirements

To install the PeopleSoft Enterprise Infosync server, you must have the following skills and knowledge:

- An understanding of Microsoft Windows administration.
- An understanding of groupware administration for the groupware platform that will be synchronized through the PeopleSoft Enterprise Infosync server.

---

**Note.** The names *Infosync*, *Intellisync*, and *Email Accelerator* are synonymous and will be used interchangeably throughout this installation.

---

## **Task 10-3-1: Understanding Supported Languages**

The PeopleSoft Enterprise Infosync Server is available in English, German, Japanese, French, and Spanish. In this release, PeopleSoft Enterprise Infosync Server components and the applications to which they connect, such as groupware, must all use the same language. The admin console is only available in English and Japanese.

## **Task 10-3-2: Reviewing Supported Systems**

For complete details, see Defining Infosync Server Requirements in the PeopleSoft CRM 9 Hardware Software Guide.

---

## **Task 10-4: Preparing the PeopleSoft Enterprise Infosync Server for Domino**

Please read the document EAInstall\_Domino.doc if you are installing the Infosync server with a Domino server. This file can be found in the Intellisync directory when you unzip the Infosync Server zip file in task 10-7. This document will walk you through all of the steps you need to perform before installing your Infosync server for Domino.

See Installing the PeopleSoft Enterprise Infosync Server.

---

## **Task 10-5: Preparing the PeopleSoft Enterprise Infosync Server for Exchange**

Please read the document EAInstall\_Exchange.doc if you are installing the Infosync server with an Exchange server. This file can be found in the Intellisync directory when you unzip the Infosync Server zip file in task 12-7. This document will walk you through all of the steps you need to perform before installing your Infosync server for Exchange.

See Installing the PeopleSoft Enterprise Infosync Server.

---

## **Task 10-6: Setting Up the PeopleSoft Integration Broker**

A complete PeopleSoft Integration Broker setup is required as part of the PeopleSoft Enterprise Infosync Server product to perform data synchronization between PeopleSoft Enterprise CRM and PIM servers. The setup delivers the PeopleSoft Integration Broker objects that are used in this integration. The information you set up in the PeopleSoft Integration Broker is needed to set up the URI specified in the PeopleSoft Enterprise Infosync installation:

- Two nodes: PSFT\_INFOSYNC and PSFT\_PIM
- One transaction message: PIM\_CONTACT\_SYNC
- Two code sets for data translation: INFOSYNC TO PIM and PIM TO INFOSYNC

To set up PeopleSoft Enterprise Infosync with the PeopleSoft Integration Broker:

---

**Note.** You should perform the following tasks before using PeopleSoft Integration Broker.

---

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes to change the default password used in the external node (that is, PSFT\_PIM).

After you make the password change on the Node Definitions page, click Save.

2. Modify the integrationGateway.properties file under:

c:\<ps\_home>\websrv\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF

- If the integration gateway supports only one database, set up the integrationGateway.properties file with the default Application server. For example:

```
ig.isc.serverURL=//<yourappserver:jsl_port>
ig.isc.userid=VP1
ig.isc.password=Ez6NDsqOkxI=
ig.isc.toolsRel=8.48
```

Your values may vary from the example above.

- If the integration gateway supports more than one database and you cannot set up the default application server to point to the correct database, set up a node as follows:

```
ig.isc.<default local node in PIM database>.serverURL=//<yourappserver:jsl_⇒
port>
ig.isc.<default local node in PIM database>.userid=VP1
ig.isc.<default local node in PIM database>.password=Ez6NDsqOkxI=
ig.isc.<default local node in PIM database>.toolsRel=8.48
```

Every database has only one default local node. The Default Local Node check box is selected for this node. Your values may vary from the example above.

---

**Note.** In both cases, make sure that the toolsRel value matches the version of your PeopleTools release.

---

3. If you change the Integration Broker user ID and password, make sure they are updated in the integrationGateway.properties file.

For the password, enter it in the encrypted form. The PeopleSoft application provides a utility that returns an encrypted version for the password you provide. The utility is called pscipher.bat and is located in the c:\<PS\_HOME>\websrv\peoplesoft directory. Run the utility from the command prompt as follows:

```
c:\pt848\websrv\peoplesoft>pscipher <your_password>
```

4. Select PeopleTools, Integration Broker, Configuration, Gateways to access the Gateways page.
5. Click Search for the local Gateways page and verify that the gateway URL is updated with the web server name on which the Integration Broker resides.
6. If the URL field is blank:
  - a. Enter the Gateway URL in the Gateway URL field. For example:  
http://<webserver name>:<port number>/PSIGW/PeopleSoftListeningConnector
  - b. Click the Load Gateway Connectors button to populate the connector information and click Save.



7. Update the Integration Broker Parameter. You must update the Integration Broker-related variable in the PeopleSoft application server configuration file (psappsrv.cfg). Specifically, you must update the value of the Min Message Size for Compression variable to 1000000, if it is not higher than 1000000, as illustrated:

```
----- [Integration Broker]
=====
; General settings for the Integration Broker ;=====
===== ; Minimum size of message data for
synchronous handler to enable compression. Min Message Size For Compression=1000000
-----
```

This value denotes that Integration Broker will compress outgoing messages when the message size exceeds this set value. For PeopleSoft Sales for Blackberry to work correctly, outgoing Integration Broker messages should never be in a compressed state. Integration Broker logs will display whether a message is pushed out in a compressed state or not.

---

**Note.** Do not log on to the PeopleSoft Enterprise Infosync Server and perform synchronization using the same user ID that PeopleSoft Integration Broker uses, as specified in the integrationGateway.properties file.

---

## Task 10-7: Installing the PeopleSoft Enterprise Infosync Server

To install the PeopleSoft Enterprise Infosync server:

1. Unzip the IMS2SGMRelease6.6.zip file from the setup directory.
2. Double-click Setup.exe from the Intellisync directory to start the PeopleSoft Enterprise Infosync Server installation program.

Please follow the directions in the Intellisync Mobile Suite install guide, called SynchroInstallGdeEN.pdf. It is found in the Intellisync directory where you unzipped the IMS2SGMRelease6.6.zip file. You do not need to worry about installing the client pieces. Those are not used in interfacing to Enterprise CRM.

You will be prompted for a license key when installing. That license key is  
034B4A42CBB4B5B4B5B4B54B4A43480BB9

3. Apply the following two hotfixes to your IMS environment: IMS\_hotfix\_6\_6\_0\_55.ZIP and IMS\_hotfix\_6\_6\_1\_4.ZIP. Please refer to the corresponding readme files included in hotfix zip to get details about hotfixes.

---

## Task 10-8: Setting Up PeopleSoft Enterprise CRM Access

This section discusses:

- Adding the XML Node
- Modifying the XML Connector Settings in the Admin Console
- Enabling Signon PeopleCode
- Activating a Service Operation
- Creating Users for Accessing PeopleSoft Enterprise CRM from the PeopleSoft Infosync Server

- Defining PIM Install Options
- Defining PIM Preferences

## **Task 10-8-1: Adding the XML Node**

To add the XML node:

1. Please read the document XMLConnector.pdf and follow the steps in that document to add an XML node. The document is found in the Intellisync\Documentation\English directory where you unzipped the IMS2SGMRelease6.6.zip file.  
  
The remainder of this document assumes that you named this node “PeopleSoft” and created a setting underneath the node as “Default.”
2. When prompted for an XML Connector ID, please use 100.

## **Task 10-8-2: Modifying the XML Connector Settings in the Admin Console**

To modify the XML connector settings:

1. Select Start, Programs, Intellisync Mobile Suite, Admin Console to access the administration functions.
2. Expand the Intellisync Mobile Suite node if it is not expanded. Expand the Profile Settings node and then expand the Email Accelerator node.
3. Expand the PeopleSoft node, select the Default node (or the one you installed), right-click it and select Properties.

A page appears where you can enter the following:

**Default Properties**

Settings | Advanced

**XML Translator Settings**

Standard XML Connection Settings

Server URL:

Server Port:

Server URI:

Connection Verb:

Secure XML Connection Settings

☐ Use Secure XML Server

Secure Server URL:

Secure Server Port:

Secure Server URI:

Access XML Server Using:

☒ A separate user name and password

☐ Same user name and password used to access Intellisync Mobile Suite

☐ Instead of the user's password, use this password:

Polling

☒ Enable Polling  5 Minutes

XML Translator Settings window

- For the Server URL, enter the web server name where your Integration Broker is running.
- For the Server port, enter the port number of the web server.
- For the Server URI, the string is determined by the integrationGateway.properties file.

If your integrationGateway.properties file has a default application server defined, type the following in the Server URI:

```
/PSIGW/HttpListeningConnector?From=PSFT_PIM&MessageName=PIM_CONTACT_=>
SYNC&MessageType=sync&Password=infosync
```

If your integrationGateway.properties file does not have a default application server defined and specifies a NODENAME, then type the following in the Server URI:

```
/PSIGW/HttpListeningConnector?From=PSFT_PIM&To=<defaultLocalNode>&MessageName=>
=>
PIM_CONTACT_SYNC&MessageType=sync&Password=infosync
```

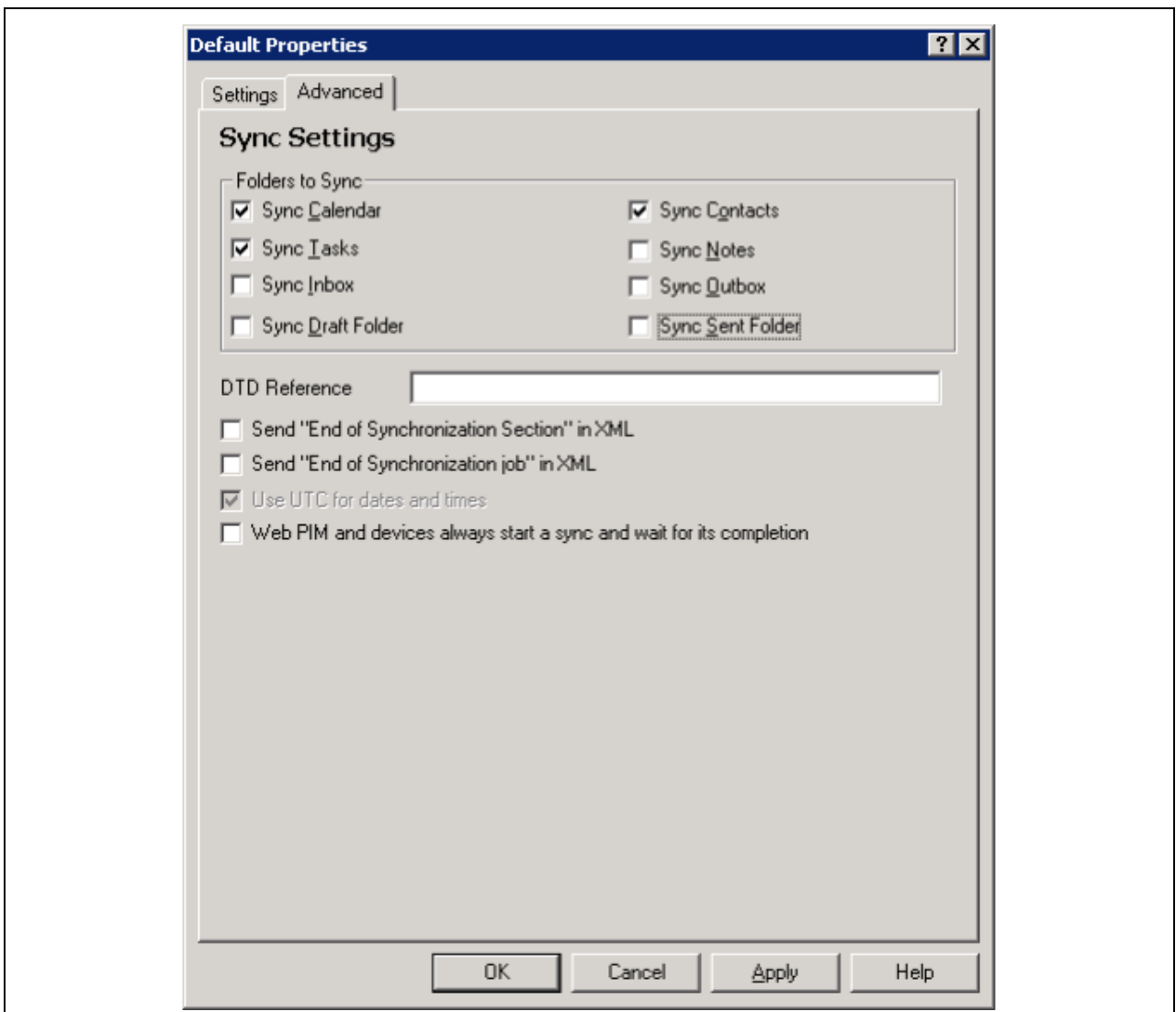
- The <defaultLocalNode> should be replaced with the node defined as your default local node on your database and defined as the NODENAME pointing to the correct application server in the integrationGateway.properties file.
  - If the default password that is used in the external node (PSFT\_PIM) is changed, as recommended in task 10-6, then you must also make the changes in the Server URI string. Replace the default password “infosync” with the new password.
4. Click Save after making your modifications.

---

**Note.** Test the Check Server Connection after completing the Defining PIM Preferences section later in this task.

---

5. Select the Advanced tab and verify that the Folders to Sync in the Sync Settings match the check boxes below. The Sync Calendar, Sync Tasks, and Sync Contacts should be the only check boxes selected:



Sync Settings window

## Task 10-8-3: Enabling Signon PeopleCode

To enable Signon PeopleCode for the PeopleSoft Enterprise Infosync Server integration:

1. Select PeopleTools, Security, Security Objects, Signon PeopleCode to enable the Signon PeopleCode program on the Signon PeopleCode page.
2. Select the Invoke as user signing in option.
3. Add a new row for the PIM Signon PeopleCode program if it does not already exist. Click the + sign to add a new row.
4. Enter or select the following values for the new row:
  - A sequence number.
  - The Enabled check box for this row.
  - *FUNCLIB\_PIM* as the Record.
  - *PWDCNTL* as the Field Name.
  - *FieldDefault* as the Event Name.
  - *PIM\_Authentication* as the Function Name.
  - The Exec Auth Fail check box.
5. Save the page.
6. Sign out of your database, delete the application server cache, and restart the application server.

### See Also

*Enterprise PeopleTools 8.48 PeopleBook: Security Administration*, “Employing Signon PeopleCode and User Exits”

## Task 10-8-4: Activating a Service Operation

To activate a service operation:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. Type the Service Operation name as “PIM\_CONTACT\_SYNC” and click the Search button.
3. Open the details screen for PIM\_CONTACT\_SYNC service operation and select the Active check box.
4. On the Handlers tab, select Active in the Status drop-down list box for REQUESTHDLR handler.
5. Save the changes by clicking the Save button.
6. On the Routings tab, select all check boxes in the Selected column and click the “Activate Selected Routings button.
7. Save your changes by clicking the Save button.

## Task 10-8-5: Creating Users for Accessing PeopleSoft Enterprise CRM from the PeopleSoft Infosync Server

This task creates the Transient User ID that is used in the next task.

See Defining the PIM Transient User.

To create user IDs that are referenced in the PIM System Data page:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. On the General page, select a Symbolic ID and Password.
3. Select the ID tab, and set the ID Type to *None*.
4. Click Save.

## Task 10-8-6: Defining PIM Install Options

### Defining the PIM Transient User

To define the PIM Transient User:

1. Select Set Up CRM, Product Related, Infosync, Install Options to access the PIM Install Options page.
2. Define the following User IDs:
  - PIM Transient User ID: Enter a user ID that serves as a transient user. This user was created in the previous task.
  - PIM Transient User Password: Enter the password of the transient user.

The PIM transient user must be different than the Integration Broker User ID (specified in User Id Sign On in the Integration Broker gateway.properties file).

## Task 10-8-7: Defining PIM Preferences

A PIM Preference ID must be assigned to a user before they can synchronize their data.

To set a User's PIM Preference ID in PeopleSoft Enterprise CRM:

1. Log in to the CRM database using PIA.
2. Select Set Up CRM, Security, User Preferences.
3. Search for the User ID and select the PIM Preference ID for the user.
4. Click Save.
5. Select Set Up CRM, Product Related, Infosync, Preferences to access the PIM Preferences page.
6. Search for the PIM Preference ID that the user is assigned.
7. On the Setup page, select the PIM Application Type for your mail application (Exchange Server or Domino Server):

**Setup** Contact Consumer Worker Address Calendar Task

**PIM Preference ID:** PIM SALES

**\*Description:** Preferences for Sales Users

**PIM Application Type**

**PIM Application Type:** Domino Server

**Mail Folder:** adas0117c

**Template File:**

**PIM User Group:**

**PIA Machine Name:** jnakai052704

**Address Book Server:** CN=DS-NOTES-01/O=Dsi-Ds

**Address Book Name Prefix:**

**Address Book Name Suffix:**

**General Settings**

**PIA URI:** http://<web server>/psp/ps

**PIA Portal:** EMPLOYEE

**PIA Node:** CRM

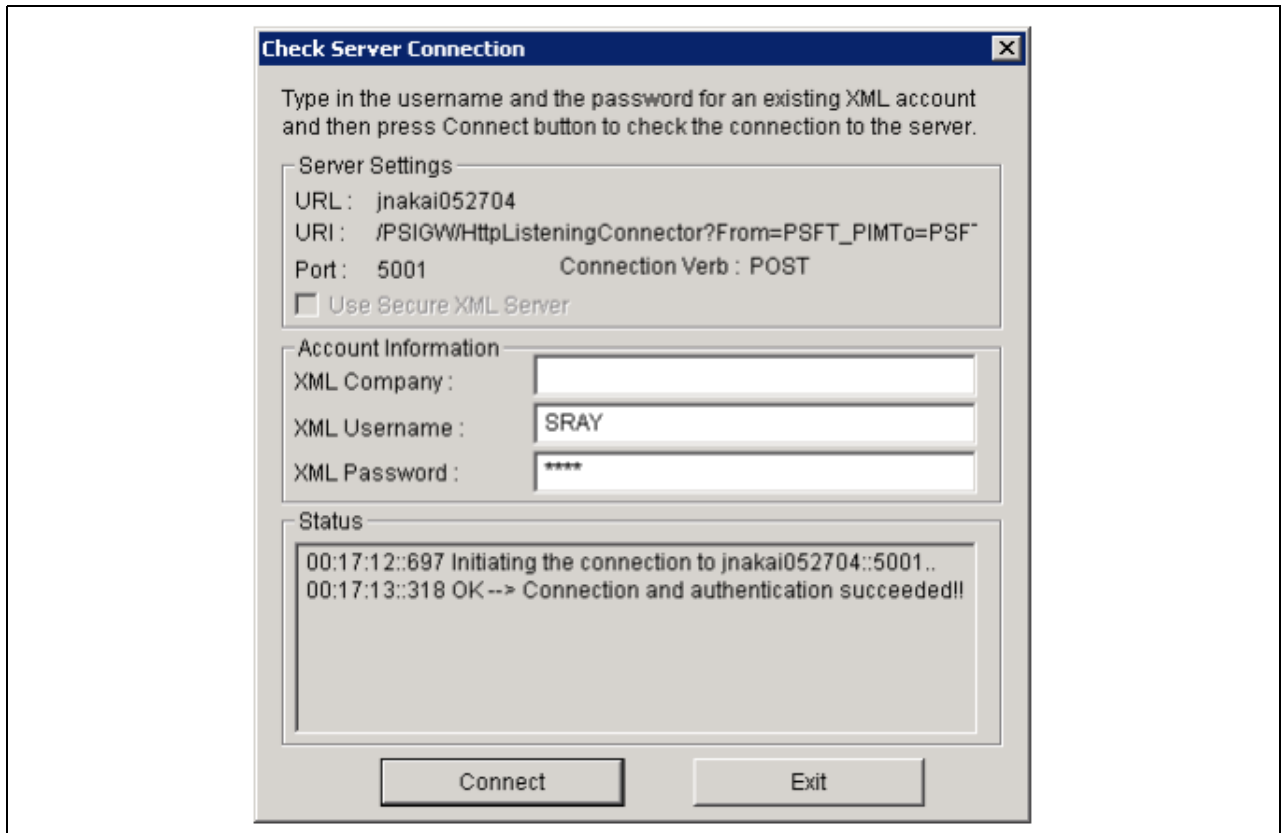
☐ Debug

Save Return to Search Previous in List Next in List Add Update/Display

PIM Preferences Setup page

- If Exchange Server is selected, enter the Mail Domain Name and PIA Machine Name.
  - If Domino Server is selected, enter the Mail Folder and PIA Machine Name.
8. Click Save.
- The next steps test the connection to the XML Connector.
9. Select Start, Programs, Intellisync Mobile Suite, Admin Console to access the administration functions.
  10. Expand the Intellisync Mobile Suite node if it is not expanded.
  11. Expand the Profile Settings node and then expand the Email Accelerator node.
  12. Expand the PeopleSoft node (or the one you installed), select the Default node, right-click it and select Properties.
  13. Click Check Server Connection and enter the User ID in the XML Username field and the password in the XML Password field for any of the users that you associated with a PIM Preference ID in step 3 of this task.
  14. Click the Connect button.

A status box should display a successful result:



Check Server Connection dialog box

## Task 10-9: Exporting Users from PeopleSoft Enterprise CRM to the PeopleSoft Enterprise Infosync Server

This section discusses:

- Understanding User Export from CRM to Infosync
- Running AE Through the PeopleSoft Pure Internet Architecture
- Running AE Through the DOS Prompt

### Understanding User Export from CRM to Infosync

PeopleSoft Enterprise CRM delivers an application engine (AE) process (PIM\_ID\_SYNC) that exports PIM user IDs from the PeopleSoft Enterprise CRM system to a text file. The file is used by a utility to import users to the PeopleSoft Enterprise Infosync server. You can run this AE process in one of two ways: PIA or through the DOS prompt.

#### Task 10-9-1: Running AE Through the PeopleSoft Pure Internet Architecture

To run the AE process through PIA:



---

**Note.** Make sure that the Process Scheduler is up and running before making any AE process requests on PIA.

---

1. Select Set Up CRM, Product Related, Infosync, User ID Export to access the PIM ID Export page.  
You can use an existing run control to execute the AE process or add a new one.
2. Click Run.  
The Process Scheduler Request page appears.
3. Make sure *PIM\_ID\_SYNC* is selected in the Process List group box and click OK.
4. On the PIM ID Export page, click the Process Monitor link to check the status of the AE process. Click Refresh until the Run Status returns Success.
5. Click the Details link.  
The Process Detail page appears.
6. Click the View Log/Trace link. File count depends on whether you have PIM Preferences for both Domino and Exchange, or just one. They are as follows:
  - *.stdout*: contains the DOS prompt output
  - *Infosync\_Domino\_ID\_Import\_<date/time>.txt*  
This file is the user import text file that the Bulk User Import utility needs to import users to the PeopleSoft Enterprise Infosync Server. This file is specific to Lotus Domino Server. This file will not appear if no users were associated with PIM Preferences for Domino.
  - *Infosync\_Exchange\_ID\_Import\_<date/time>.txt*:  
This file is the user import text file that the Bulk User Import utility needs to import users to PeopleSoft Enterprise Infosync Server. This file is specific to Microsoft Exchange Server. This file will not appear if no users were associated with PIM Preferences for Domino.
  - *Infosync\_ID\_Import\_Log.txt*  
This file is the log file for the AE process. Here's the format of the log file:  
 <Date/time stamp>:<Message indicator>:<Actual message>  
 where <Message indicator> can be I (information), W (warning), or E (error).
7. If your distribution node has not been set up on your process scheduler, the View Log/Trace link may not be active. Check for the *Infosync\_Domino\_ID\_Import\_<date/time>.txt*, *Infosync\_Exchange\_ID\_Import\_<date/time>.txt*, and *Infosync\_ID\_Import\_Log.txt* files under *c:\<ps\_home>\appserv\<dbname>\prcs\<dbname>\files* directory.

## Task 10-9-2: Running AE Through the DOS Prompt

To run the AE program through the DOS prompt:

1. Open a DOS prompt. Change the directory to *c:\<ps\_home>\bin\Client\winx86*.
2. Type the following command:

```
PSAE -CT <Database Type> -CD <Database Name> -CO <User ID> -CP <Password> -R=>
PIM_ID_SYNC -AI PIM_ID_SYNC
```

where <Database Type> is the platform of the PeopleSoft Enterprise CRM database. For example, enter *MICROSFT* for a Microsoft SQL Server database or *ORACLE* for an Oracle database. <Database Name>

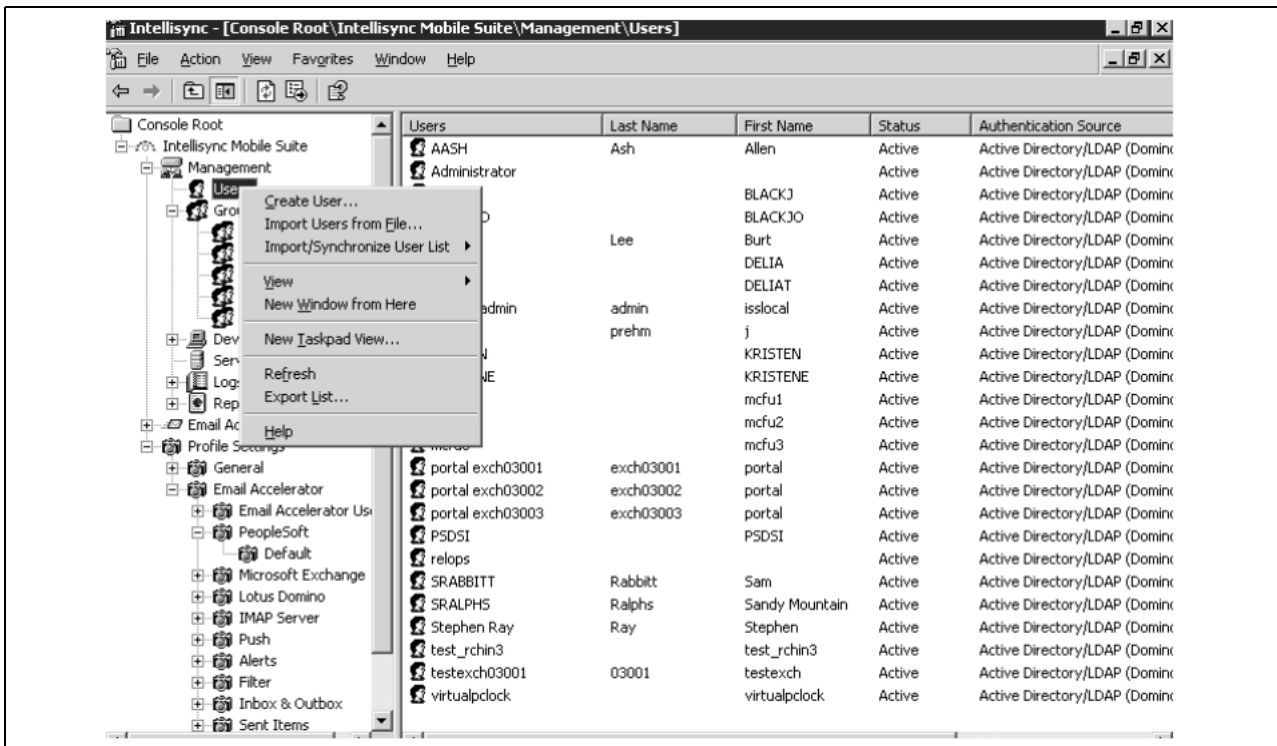
specifies the database name of the PeopleSoft CRM database. <User ID> and <Password> are the login information of the user in the PeopleSoft CRM database who requests the AE process.

3. Press ENTER.
4. File count depends on whether you have PIM Preferences for both Domino and Exchange, or for just one. Files are: Infosync\_Domino\_ID\_Import\_<date/time>.txt, Infosync\_Exchange\_ID\_Import\_<date/time>.txt, and Infosync\_Import\_Log.txt. Note that the Infosync\_Domino\_ID\_Import\_<date/time>.txt file will not appear if no users were associated with PIM Preferences for Domino, and Infosync\_Exchange\_ID\_Import\_<date/time>.txt will not appear if no users were associated with PIM Preferences for Exchange.

## Task 10-10: Importing Users into the PeopleSoft Enterprise Infosync Server

To import users into the PeopleSoft Infosync Server:

1. Select Start, Programs, Intellisync Mobile Suite, Admin Console on the Windows workstation where PeopleSoft Enterprise Infosync Server resides.
2. Expand the Intellisync Mobile Suite node. Expand the Management node.
3. Right-click the User's node and select *Import Users from File*:



Intellisync Admin Console page

4. A file select dialog box opens. Select the file that you want to import.
5. After the import process completes, review the admin console User's node to confirm that users were created for everyone in the file.

---

## Task 10-11: Preparing for the PeopleSoft Enterprise Infosync Client Installation

Verify that the following tasks have been completed. They are prerequisites for setting up the install workstation:

- The PeopleSoft Enterprise Infosync Client is supported on the Windows NT, 2000, and 2003 platforms.
- You have administrative access to install software on the workstation. The software install will write files to directories and update registry settings.
- The PeopleSoft Integration Broker gateway is running on your PeopleSoft Enterprise CRM database.
- During the setup of PeopleSoft Integration Broker, the Gateway URL points to the PeopleSoftListeningConnector (that is, `http://<webserver>/PSIGW/PeopleSoftListeningConnector`).
- The `IntegrationGateway.properties` file was updated. Please see task 10-6 for more details.

See Setting Up the PeopleSoft Integration Broker.

---

## Task 10-12: Installing the PeopleSoft Enterprise Infosync Client

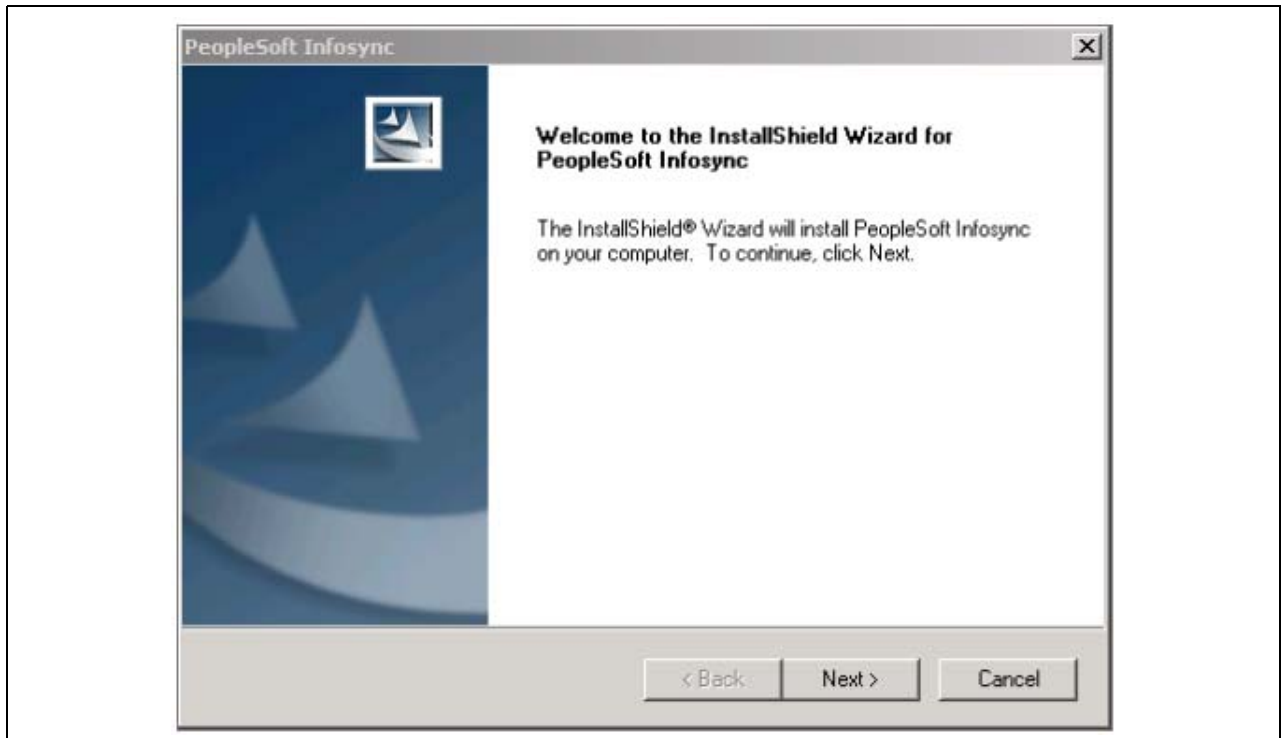
This software does not need to be installed on a workstation that has PeopleSoft PeopleTools installed. However, it is okay to install it on a workstation with PeopleSoft PeopleTools.

As explained in task 10-2 of this chapter, the CRM 9 VCD installs a setup folder that contains an `IntellisyncForPeopleSoft.exe` installer, which should be used for installing the PeopleSoft Enterprise Infosync Client Software.

You must perform some configurations for the PeopleSoft Enterprise Infosync Client to enable end users to have an easy installation process. You can send this file to your end users for installation on their workstations. However, each end user must configure the software.

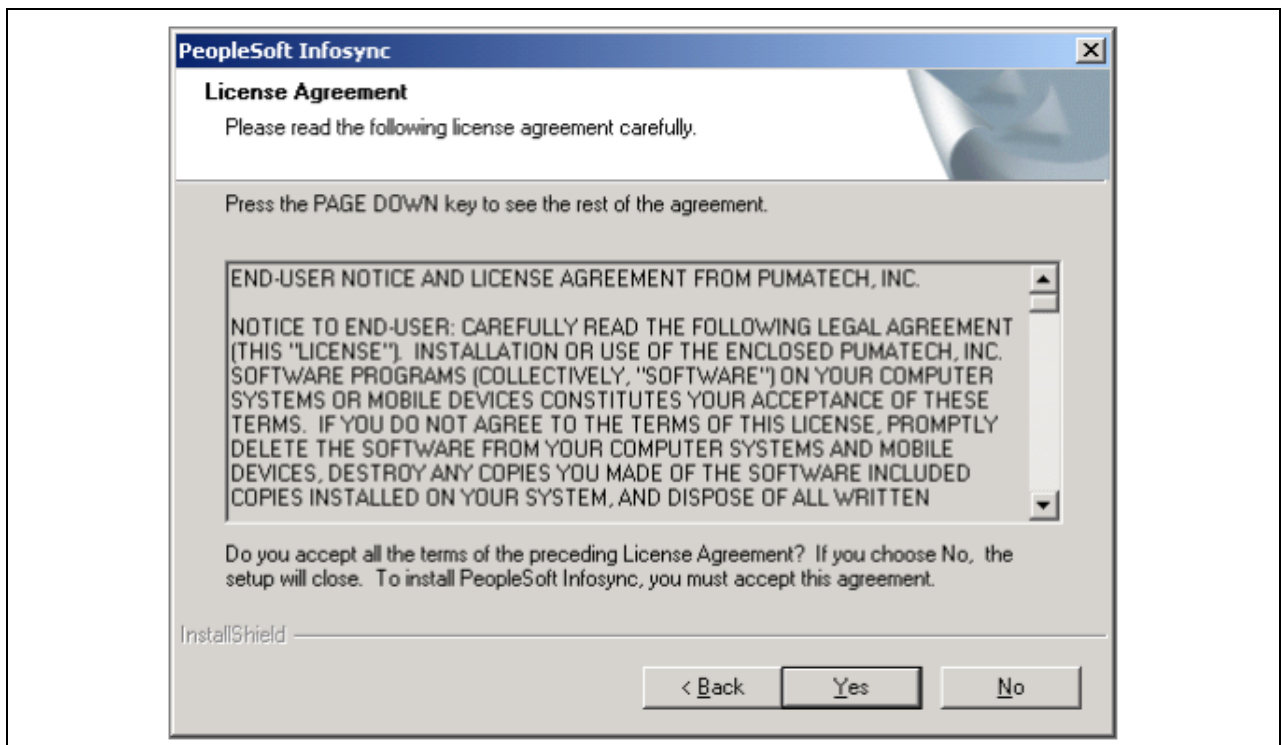
To install the PeopleSoft Enterprise Infosync Client:

1. Double-click the `IntellisyncForPeopleSoft.exe` file in the `<PS_HOME>\setup` directory:.



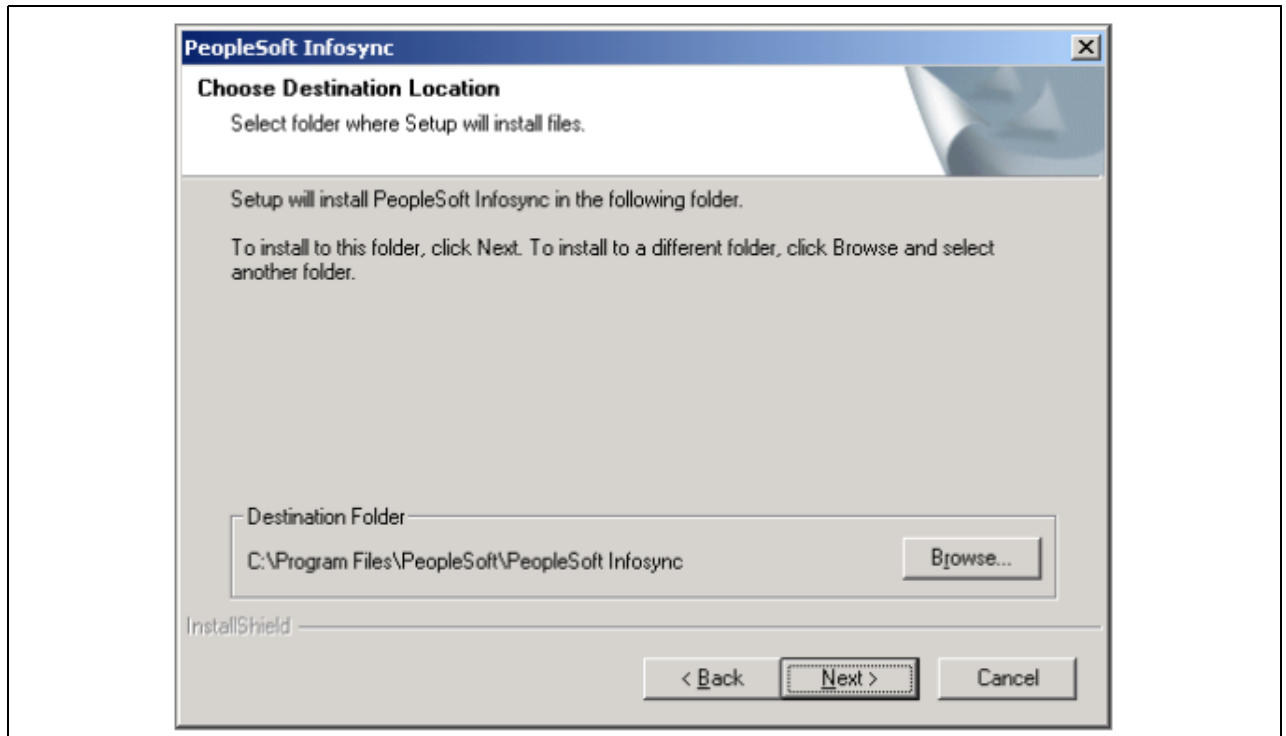
PeopleSoft Infosync Welcome page

2. Click Next.



PeopleSoft Infosync License Agreement dialog box

3. Review and accept the license agreement and click Yes.



PeopleSoft Infosync Destination Location selection dialog box

4. Choose the destination location and click Next.
5. After the PeopleSoft Infosync Client completes the install, click Finish.
6. Use any text editor to modify the configuration file named DCSSettings.CFG under C:\Program Files\PeopleSoft\PeopleSoft Infosync and change the Server URL, Port, and URI to match the system setup for the Integration Broker and default node.

For example:

```
[Connection]
Server URL=<web server>
Port=80
URI=/PSIGW/HttpListeningConnector?From=PSFT_PIM&To=PSFT_CR&MessageName=PIM_⇒
CONTACT_SYNC&MessageType=sync&Password=Infosync
```

where <web server> is the web server machine name and *PSFT\_CR* is the default local node in the CRM database and defined in the integrationGateway.properties file. The *To* that precedes the default local node must have a lowercase *o*, as shown in the previous example.

## Task 10-13: Running the PeopleSoft Enterprise Infosync Client

This section discusses:

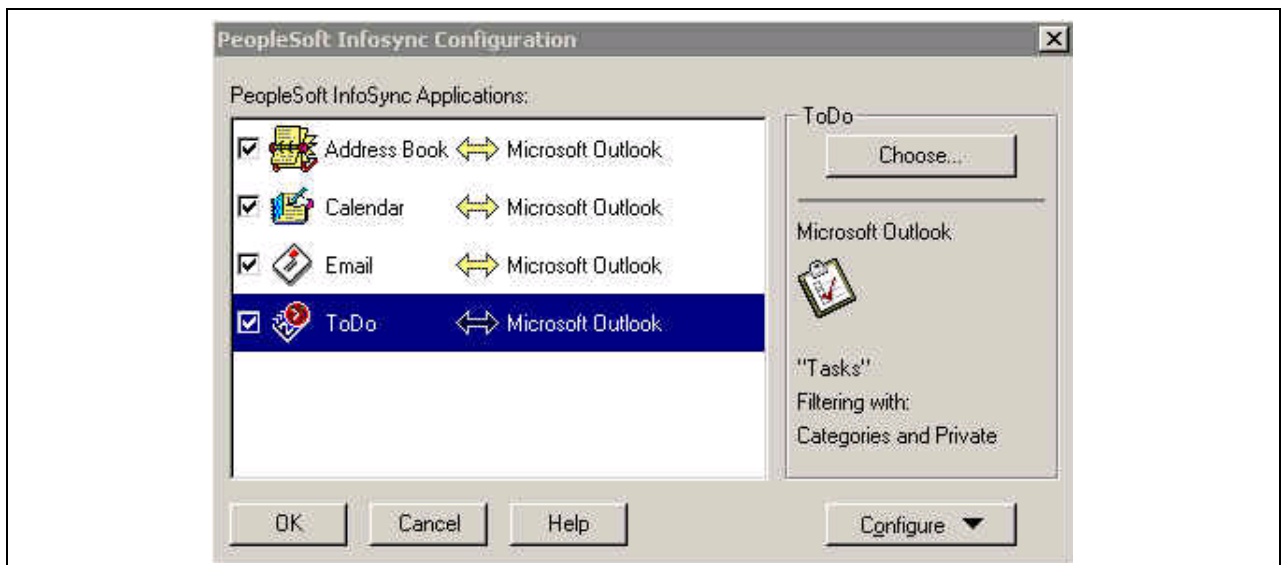
- Setting Up the PeopleSoft Enterprise Infosync Client
- Running the PeopleSoft Enterprise Infosync Client for Synchronization

## Task 10-13-1: Setting Up the PeopleSoft Enterprise Infosync Client

The first task in configuring the PeopleSoft Enterprise Infosync solution is to select which PIM applications your end users are running.

To set up the PeopleSoft Enterprise Infosync Client:

1. Select Start, Programs, PeopleSoft Inc, PeopleSoft Infosync, PeopleSoft Infosync to start the PeopleSoft Enterprise Infosync Client.
2. Click the Setup button to specify synchronization settings.
3. Click Configure Applications.

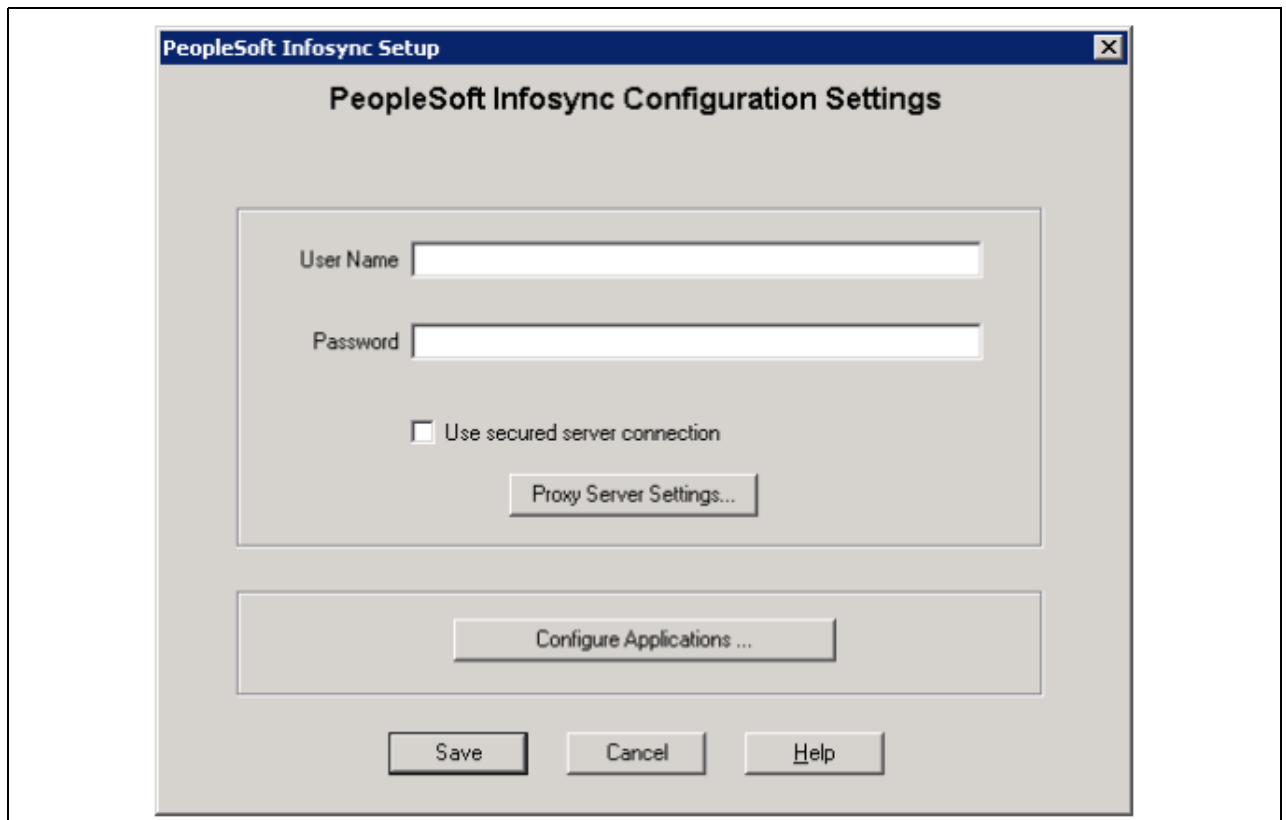


PeopleSoft Infosync Configuration dialog box

4. Highlight the Address Book and click Choose.
5. Select the Correct PIM software your end users will be running: Lotus Notes 4.5, Lotus Notes 4.6, Lotus Notes 5.0/6.0/6.5, or Microsoft Outlook.
6. Repeat steps 4 and 5 for Calendar, Email, and ToDo.
7. Highlight Address Book and select Configure, Advanced Settings.
  - Select the Confirmation tab. If you want your end users to confirm deletes, select the first box. If you want your end users to confirm adds and changes, select the second box.
  - Select the Conflict Resolution tab, and select the option for the conflict you want to run.
  - Select the Filters tab. The delivered filter is Categories. Select the appropriate filter or you may create your own.
8. Highlight Calendar and select Configure, Advanced Settings.
  - Select the Date Range tab. Choose the appropriate date range to synchronize.
  - Select the Confirmation tab. If you want your end user to confirm deletes, select the first box. If you want your end user to confirm adds and changes, select the second box.
  - Select the Conflict Resolution tab, and select the option for the conflict you want to run.

- Select the Filters tab. The three filters that are delivered are Exclude Private Data, Categories, and Categories and Private. Select the appropriate filter or you may create your own.
9. Highlight Email and select Configure, Advanced Settings.
    - Select the Confirmation tab.

If you want your end users to confirm deletes, select the first box. If you want your end users to confirm adds and changes, select the second box.
    - Select the Conflict Resolution tab, and select the option for the conflict you want to run.
    - Select the Filter tab. Create your own appropriate filter.
  10. Highlight ToDo and select Configure, Advanced Settings.
    - Select the ToDo tab. Select the appropriate option for transferring ToDo items.
    - Select the Confirmation tab. If you want your end users to confirm deletes, select the first box. If you want your end users to confirm adds and changes, select the second box.
    - Select the Conflict Resolution tab, and select the option for the conflict you want to run.
    - Select the Filters tab. The three filters that are delivered are Exclude Private Data, Categories, and Categories and Private. Select the appropriate filter or you may create your own. Please see the documentation about the interaction between the filters in the Pumatech software and the categories you selected on the PIM Preferences.
  11. Click OK.



PeopleSoft Infosync Setup dialog box

12. Enter a User Name and Password for synchronization. The user must have a PIM Preference ID assigned. Click Save.

---

**Note.** A PIM Preference ID must be assigned to a user before they can synchronize their data. A user's PIM Preference ID is set in the CRM database. Log in to the CRM database using PIA and select Set Up CRM, Security, User Preferences. Search for the User ID and select the PIM Preference ID for the user. Click Save.

---

## **Task 10-13-2: Running the PeopleSoft Enterprise Infosync Client for Synchronization**

To run the PeopleSoft Enterprise Infosync Client for synchronization:

1. Select Start, Programs, PeopleSoft Inc, PeopleSoft Infosync, PeopleSoft Infosync to start the PeopleSoft Enterprise Infosync Client.
2. Click the Sync button to synchronize your data.



## CHAPTER 11

# Setting Up PeopleSoft Online Marketing 9 and PeopleSoft Student Administration 8 SP1 and Student Administration 8.9 Integration

This chapter discusses:

- Understanding the PeopleSoft Online Marketing 9 and PeopleSoft Student Administration 8 SP1 and Student Administration 8.9 Integration
- Prerequisites
- Setting Up the PeopleSoft Student Administration Database for PeopleSoft OLM Integration
- Setting Up PeopleSoft Online Marketing for PeopleSoft Student Administration Integration

---

## Understanding the PeopleSoft Online Marketing 9 and PeopleSoft Student Administration 8 SP1 and Student Administration 8.9 Integration

This chapter provides instructions for integrating Oracle's PeopleSoft Enterprise Online Marketing (OLM) 9 and PeopleSoft Enterprise Student Administration 8 SP1 (SA 8 SP1) and Student Administration 8.9 (SA 8.9).

---

**Note.** Before proceeding with your installation, consult Oracle's PeopleSoft Customer Connection website to ensure that you have the latest version of the following documents: PeopleSoft Enterprise PeopleTools 8.48 Installation guide for your database platform and *PeopleSoft Enterprise PeopleTools 8.48 PeopleBooks*.

---

---

**Note.** In addition, consult the PeopleSoft Enterprise CRM 9 Product-to-PeopleBook Index located on Oracle's PeopleSoft Customer Connection website to determine which PeopleBooks you should include in your installation for the PeopleSoft CRM products that you are implementing.

---

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## Prerequisites

Before you begin the PeopleSoft OLM and PeopleSoft SA installation and integration, ensure that these requirements are met:

- Install and configure a PeopleSoft CRM 9 database.
- Install and configure a PeopleSoft SA database (PeopleSoft SA 8.9 is now part of Human Capital Management 8.9).

---

**Note.** Configuring the PeopleSoft SA database for integration to a PeopleSoft CRM database requires that you carry out tasks on *both* the PeopleSoft CRM database and the PeopleSoft SA database. The task *Setting Up the Student Administration Database for OLM Integration*, describes the steps that you must perform on the PeopleSoft SA database. The task *Setting Up Online Marketing for PeopleSoft Student Administration Integration*, describes the steps that you must perform on the PeopleSoft CRM database.

Complete these tasks for both the PeopleSoft CRM database and the PeopleSoft SA database:

---

- Set up the FTP server for the PeopleSoft SA database.

---

## Task 11-1: Setting Up the PeopleSoft Student Administration Database for PeopleSoft OLM Integration

This section discusses:

- Activating Message Statuses
- Setting Up Message Channels
- Setting Up Node and Message Transactions (PeopleSoft SA 8.9 Only)
- Defining Full Data Publish Rules
- Setting Message Monitor Security
- Verifying Connectivity
- Verifying PERSON\_BASIC\_FULLSYNC and PERSON\_BASIC\_SYNC Message Statuses
- Granting Security for Application Engine Processes and New Pages
- Using the ADCRMPST Job Definition
- Using the SAD\_CRM\_SYN2 Process Scheduler Job Definition

---

**Note.** Complete the steps in this section on the PeopleSoft SA database.

---

### Task 11-1-1: Activating Message Statuses

Open each message in the following list to verify that the status is set to *Active* on the Message Properties tab. If it is not, select *Active* and click Save.

1. Open each message in PeopleSoft Application Designer.
2. Select the Message Properties Use tab.
3. Set the status of the following messages to *Active*:
  - CS\_ADM\_APPL\_DATA\_FULLSYNC
  - CS\_ADM\_PRSPCT\_DATA\_FULLSYNC
  - CS\_PERS\_DATA\_EXTEND\_FULLSYNC
  - CS\_TEST\_SCORES\_FULLSYNC
  - CS\_SCRTY\_APPL\_CTR\_FULLSYNC

- CS\_SCRTY\_RECR\_CTR\_FULLSYNC
- CS\_EMAIL\_NOTICE
- CS\_STUDENT\_BOID\_SYNC
- CS\_T189\_ADM\_APPL\_SYNC
- CS\_PRFL\_ATTR\_CHOICES\_FULLSYNC
- CS\_STUDENT\_TOPIC\_SYNC
- PERSON\_BASIC\_SYNC (SA 8.9 only)
- PERSON\_BASIC\_FULLSYNC (SA 8.9 only)
- CS\_PERSON\_BASIC\_FULLSYNC (SA 8SP1 only)

## Task 11-1-2: Setting Up Message Channels

The system provides these default message channels: SAD\_CRM\_DATA, SAD\_CRM\_SETUP, and PERSON\_DATA.

To set up message channels:

1. Open each message channel in PeopleSoft Application Designer.
2. If you are installing PeopleSoft SA 8 SP1, select the Routing Rules tab and add the PeopleSoft CRM node (create a new node with the name of the PeopleSoft CRM instance) to be used for these messages.

This node is likely to have the same name as the PeopleSoft CRM instance. For example, C80R20.

3. Verify that Message Channel SAD\_CRM\_DATA contains these messages:

- CS\_ADM\_APPL\_DATA\_FULLSYNC
- CS\_ADM\_PRSPCT\_DATA\_FULLSYNC
- CS\_EMAIL\_NOTICE
- CS\_PERS\_DATA\_EXTEND\_FULLSYNC
- CS\_SCRTY\_APPL\_CTR\_FULLSYNC
- CS\_SCRTY\_RECR\_CTR\_FULLSYNC
- CS\_STUDENT\_BOID\_SYNC
- CS\_T189\_ADM\_APPL\_SYNC
- CS\_TEST\_SCORES\_FULLSYNC
- CS\_PERSON\_BASIC\_FULLSYNC (PeopleSoft SA 8SP1 only)

4. Verify that Message Channel SAD\_CRM\_SETUP contains these messages:

- CS\_PRFL\_ATTR\_CHOICES\_FULLSYNC
- CS\_STUDENT\_TOPIC\_SYNC

5. Verify that Message Channel PERSON\_DATA contains these messages:

- PERSON\_BASIC\_SYNC
- PERSON\_BASIC\_FULLSYNC

## Task 11-1-3: Setting Up Node and Message Transactions (PeopleSoft SA 8.9 Only)

For PeopleSoft SA 8.9, you must create a PeopleSoft CRM node and corresponding message transactions.

To set up node and message transactions for PeopleSoft SA 8.9 only:

1. Select PeopleTools, Integration Broker, Integration Setup, Node Definitions.
2. Add the PeopleSoft CRM node (create a new node with the name of the PeopleSoft CRM instance) to be used for messaging.
3. On the Transactions tab, add the following transactions:

Transaction Type	Request Message	Request Message Version
InAsync	CS_EMAIL_NOTICE	VERSION_1
InAsync	CS_STUDENT_TOPIC_SYNC	VERSION_1
InAsync	CS_T189_ADM_APPL_SYNC	VERSION_1
OutAsync	CS_ADM_APPL_DATA_FULLSYNC	VERSION_1
OutAsync	CS_ADM_PRSPCT_DATA_FULLSYNC	VERSION_1
OutAsync	CS_PERS_DATA_EXTEND_FULLSYNC	VERSION_1
OutAsync	CS_PRFL_ATTR_CHOICES_FULLSYNC	VERSION_1
OutAsync	CS_SCRTY_APPL_CTR_FULLSYNC	VERSION_1
OutAsync	CS_SCRTY_RECR_CTR_FULLSYNC	VERSION_1
OutAsync	CS_STUDENT_BOID_SYNC	VERSION_1
OutAsync	CS_TEST_SCORES_FULLSYNC	VERSION_1
OutAsync	PERSON_BASIC_FULLSYNC	VERSION_3

## Task 11-1-4: Defining Full Data Publish Rules

You must define a rule for each full sync message that is defined in your system.

To define full data publish rules:

1. For PeopleSoft SA 8SP1, select Home, Define Business Rules, Manage Integration Rules, Use, Full Table Publish Rules.

For PeopleSoft SA 8.9, select Enterprise Components, Integration Definitions, Full Data Publish.

2. Create full data publish rules for the message CS\_ADM\_APPL\_DATA\_FULLSYNC as follows:
  - a. On the Full Table Publish Rules tab, enter a Publish Rule ID and a Description.
  - b. Switch the Status flag to *Active*.
  - c. Select the Create Message Header option.
  - d. On the Record Mapping tab, enter the following information:

Message Record Name	Source/Order by Record Name
ADM_APPL_DATA	SAD_CRM_FLT_DAT
ADM_APPL_PROG	SAD_CRM_FLT_PRG
ADM_APPL_PLAN	SAD_CRM_FLT_PLN
ADM_APPL_SBPLAN	SAD_CRM_FLT_SPL

3. Create a rule for each of the following messages, and ensure that you select the Header option for each message.

Message Name	Message Record Name	Source/Order by Record Name
CS_ADM_PRSPCT_DATA_FULLSYNC	ADM_PRSPCT_CAR	SAD_CRM_FLT_PRS
CS_PERS_DATA_EXTEND_FULLSYNC	ADM_INTERESTS	SAD_CRM_FLT_ADM
	DISABILITY	SAD_CRM_FLT_DIS
	DIVERSITY	SAD_CRM_FLT_DIV
	EXTRACUR_ACTVTY	SAD_CRM_FLT_EXT
	EXT_ACAD_DATA	SAD_CRM_FLT_ACD
	EXT_ACAD_SUM	SAD_CRM_FLT_ACS
	PERSONAL_DATA	SAD_CRM_FLT_PER
	SRVC_IND_DATA	SAD_CRM_FLT_SRV
CS_SCRTY_APPL_CTR_FULLSYNC	No mapping required	
CS_SCRTY_RECR_CTR_FULLSYNC	No mapping required	
CS_TEST_SCORES_FULLSYNC	STDNT_TEST	SAD_CRM_FLT_TST

4. For PeopleSoft SA 8 SP1, create publish rules for CS\_PERSON\_BASIC\_FULLSYNC.  
For PeopleSoft SA 8.9, create publish rules for PERSON\_BASIC\_FULLSYNC.
  - a. On the Full Table Publish Rules tab, enter a Publish Rule ID and a Description (*Person\_Basic\_Full*).

- b. Switch the Status flag to *Active*.
- c. Select the Create Message Header option.
- d. On the Record Mapping tab, enter:  
*PERSONAL\_DATA* as the Message Record Name for PeopleSoft SA 8 SP1 or *PERSON* for PeopleSoft SA 8.9.  
*SAD\_CRM\_FLT\_PER* as the Source/order by Record name.
- e. On the Full Table Publish Rules tab, enter a Publish Rule ID and a Description (*Person\_Basic\_Inc*).
- f. Switch the Status flag to *Inactive*.
- g. Select the Create Message Header option.
- h. On the Record Mapping tab, enter:  
*PERSONAL\_DATA* as the Message Record Name for PeopleSoft SA 8 SP1 or *PERSON* for PeopleSoft SA 8.9.  
*SAD\_CRM\_FLT\_BAS* as the Source/order by Record name.

---

**Note.** You can use this new row to perform incremental full sync publishes based on the last run date of the process.

---

The first row is active for the first full publish sync that you perform and uses the view PS\_SAD\_CRM\_FLT\_PER to filter the integration, based on EMPLIDS that exist in the PS\_SAD\_CRM\_EMPLIDS table.

After the first run, you can switch the first row to inactive and then activate the second row. The second row uses a view based on PS\_SAD\_CRM\_FLT\_BAS to filter the integration, based on EMPLIDS that exist in the PS\_SAD\_CRM\_EMPLIDS table, and has a PERS\_DATA\_EFFDT that is greater than or equal to the last run date of the process.

5. Load profile choices for the message CS\_PRFL\_ATTR\_CHOICES\_FULLSYNC:
  - a. On the Full Table Publish Rules tab, create a new row for each of the choice types listed in step #5e.
  - b. Create a unique Publish Rule ID and Description for each.
  - c. Set the status to Active.
  - d. Clear the Create Message Header and Create Message Trailer options.
  - e. On the Record Mapping tab, for the Message Record Name of SAD\_CRM\_ACH\_WRK, configure the following:

Publish Rule ID	Description	Source/Order by Record Name
ACTIONS	Program Actions	SAD_CRM_ACTN_VW
APP_CENTERS	Application Centers	SAD_CRM_ACTR_VW
ACTIVITIES	Extracurricular Activities	SAD_CRM_ACTV_VW
ADMIT_TERMS	Admit Terms	SAD_CRM_ATRM_VW
ADMIT_TYPES	Admit Types	SAD_CRM_ATYP_VW

Publish Rule ID	Description	Source/Order by Record Name
CAMPUS	Campus	SAD_CRM_CAMP_VW
EXT_SUBJECTS	External Subjects	SAD_CRM_ESUB_VW
EXT_TERMS	External Terms	SAD_CRM_ETRM_VW
EXP_GRAD_TERMS	Expected Graduation Terms	SAD_CRM_GTRM_VW
GPA_TYPES	GPA Types	SAD_CRM_GTYP_VW
INSTITUTIONS	Institutions	SAD_CRM_INST_VW
PLANS	Academic Plans	SAD_CRM_PLAN_VW
PROGRAMS	Academic Programs	SAD_CRM_PROG_VW
RECRUIT_CAT	Recruiting Categories	SAD_CRM_RCAT_VW
REC_CENTERS	Recruiting Centers	SAD_CRM_RCTR_VW
ACTN_REASONS	Academic Program Action Reasons	SAD_CRM_RSN_VW
REFERRAL_SOURCE	Referral Source	SAD_CRM_RSRC_VW
REQ_TERMS	Requirement Terms	SAD_CRM_RTRM_VW
SUMM_TYPES	Summary Types	SAD_CRM_SMTT_VW
SUB_PLANS	Academic Sub-Plans	SAD_CRM_SPLN_VW
SRVC_IND	Service Indicators	SAD_CRM_SRVC_VW
TERMS	Terms	SAD_CRM_STRM_VW
TEST_COMP	Test Components	SAD_CRM_TCMP_VW
TEST_ID	Test IDs	SAD_CRM_TEST_VW

## Task 11-1-5: Setting Message Monitor Security

To set Message Monitor Security:

- For PeopleSoft *SA 8 SP1*, select Home, PeopleTools, Maintain Security, Use, Permission Lists.  
For PeopleSoft *SA 8.9*, select Home, People Tools, Security, Permission Lists.
- Select the appropriate permission list.
- Select the Message Monitor tab.
- Verify that FULL access is granted for the following messages:
  - SAD\_CRM\_DATA

- SAD\_CRM\_SETUP
- PERSON\_DATA
- PERSON\_SETUP

## Task 11-1-6: Verifying Connectivity

To verify connectivity to PeopleSoft CRM:

1. For PeopleSoft SA 8 SP1, select Home, PeopleTools, Application Message Monitor, Use, Application Message Monitor.  
For PeopleSoft SA 8.9, select Home, People Tools, Integration Broker, Monitor Integrations, Monitor Message.
2. On the Channel Status tab, check the status for the channels that are being used for the project messages.  
The default channels are SAD\_CRM\_DATA, SAD\_CRM\_SETUP, PERSON\_DATA, and PERSON\_SETUP.  
If the channels are currently paused, then click the Run button to activate them.
3. Select the Node Status tab and ping the PeopleSoft CRM node that will be used for these messages.  
Typically, this node has the same name as the PeopleSoft CRM instance being used.  
If the node does not ping successfully, then a problem exists with the URL on the node definition in PeopleSoft Application Designer.
4. Select the Domain Status tab and verify that the dispatchers are active.  
If the status is *Inactive*, then select *Active* and click the Update button.

## Task 11-1-7: Verifying PERSON\_BASIC\_FULLSYNC and PERSON\_BASIC\_SYNC Message Statuses

To verify message statuses for PeopleSoft SA 8 SP1:

If the PeopleSoft SA 8 SP1 database is *not* currently configured for integration to PeopleSoft CRM, then set the messages PERSON\_BASIC\_FULLSYNC and PERSON\_BASIC\_SYNC to *Inactive*.

To verify message statuses for PeopleSoft SA 8.9:

If the PeopleSoft SA 8.9 database is currently configured for integration to PeopleSoft CRM 9, then set the messages PERSON\_BASIC\_FULLSYNC and PERSON\_BASIC\_SYNC to *Active*.

## Task 11-1-8: Granting Security for Application Engine Processes and New Pages

To grant security for Application Engine processes and new pages:

1. For PeopleSoft SA 8 SP1, select Home, PeopleTools, Maintain Security, Use, Permission Lists.  
For PeopleSoft SA 8.9, select Home, People Tools, Security, Permission Lists.
2. Select the appropriate Permission List.
3. Select the Pages tab.



4. Add the menus SAD\_CRM\_INTEGRATION, EVALUATE\_APPLICANTS, and LOAD\_EXTERNAL\_DATA.
5. Click the Edit Pages link for the SAD\_CRM\_INTEGRATION, EVALUATE\_APPLICANTS, and LOAD\_EXTERNAL\_DATA menus that you just added.
6. Click the Select All button for each menu.
7. Click OK.
8. Click OK again.
9. Click Save.

---

**Note.** You may need to sign out and sign back in to access the menu items.

---

The system delivers two methods for running the Application Engine process that posts the File Attachment Locator and Long Text Responses to the PeopleSoft SA Recruiting and Admissions transaction tables:

- You can use a *Job* that automatically runs the existing TS189 People Search/Match/Post SQR first, followed by the new PeopleSoft CRM Post File Attachments/Long Text application engine process.
- Alternatively, you can use the delivered Process Definition that runs only the PeopleSoft CRM Post File Attachments/Long Text application engine process.

This Application Engine process also publishes the CS\_STUDENT\_BOID\_SYNC message to provide EMPLID to BO\_ID mapping to PeopleSoft CRM 9.

## Task 11-1-9: Using the ADCRMPST Job Definition

To use the job definition:

1. For PeopleSoft *SA 8 SP1*, select Home, PeopleTools, Process Scheduler Manager, Use, Job Definitions.  
For PeopleSoft *SA 8.9*, select Home, PeopleTools, Process Scheduler, Jobs.
2. Enter *ADCRMPST* in the Process Job field.
3. Select the Job Definition Options tab.
4. Enter the appropriate Process Groups for the users who can run the process.

---

**Note.** If the user decides to use the Job Definition, you should delete the Process Groups for the previous EDI TS189 People Search/Match/Post (ADAPPPST).

---

## Task 11-1-10: Using the SAD\_CRM\_SYN2 Process Scheduler Job Definition

To access the process definition:

1. For PeopleSoft *SA 8 SP1*, select Home, PeopleTools, Process Scheduler Manager, Use, Job Definitions.  
For PeopleSoft *SA 8.9*, select Home, People Tools, Process Scheduler, Jobs.
2. Enter the Process Job = *SAD\_CRM\_SYN2*.
3. Select the Process Definition Options tab.
4. Enter the appropriate Process Groups for the users who can run the process.

---

**Note.** The setup tasks for the installation on the PeopleSoft SA side is now concluded.

---

---

## Task 11-2: Setting Up PeopleSoft Online Marketing for PeopleSoft Student Administration Integration

This section discusses:

- Prerequisites
- Setting Up and Testing the EIP Configuration
- Setting Up the Web Template URL in the PeopleSoft CRM Database
- Assigning Valid Mailbox Email Addresses
- Defining SETID for Inbound EIP Data
- Setting Up the FTP Server for the PeopleSoft Student Administration Database
- Populating Profile Attribute Choices from PeopleSoft Student Administration to PeopleSoft CRM
- Cleaning Up and Resetting Profile-Related Data Integrity in the PeopleSoft CRM Database
- Activating PeopleSoft CRM Profiles in the PeopleSoft CRM Database
- Populating Student Data from PeopleSoft Student Administration to PeopleSoft CRM
- Modifying the Audience To Be Secured on an Operator
- Deploy CS\_ Dialogs to Start Dialog Execution
- Running the TS189 Processes to Post Data (Optional)
- Posting Dialog Questions from PeopleSoft CRM to PeopleSoft Student Administration in the PeopleSoft CRM Database (Optional)

---

**Important!** Some of the tasks in this section must be carried out on the PeopleSoft SA database.

---

### Prerequisites

Ensure that the following requirements are met before beginning the Set Up PeopleSoft SA integration:

- A fully functional PeopleSoft Enterprise CRM Online Marketing (OLM) environment is installed.  
See “Installing PeopleSoft Online Marketing 9.”
- Security Enterprise Integration Point (EIP) settings for the Person Basic Fullsync are set.  
See “Installing PeopleSoft Online Marketing 9, ” Improving Online Marketing Transaction Performance.

### Task 11-2-1: Setting Up and Testing the EIP Configuration

This section discusses:

- Setting Up the JOLT Connect String for Application Servers
- Verifying the Local Gateway Properties

- Verifying the Required Routings if Defined in Local Node
- Setting Up the Student Administration External Node and Connector
- Testing the PeopleSoft CRM Default Local Node
- Testing the PeopleSoft SA Node
- Activating the Domain

## Setting Up the JOLT Connect String for Application Servers

Add the following properties in `<PS_HOME>\webserver\peoplesoft\applications\peoplesoft\PSIGW\WEB-INF\integrationGateway.properties`:

```
ig.isc.CRMNODENAME.serverURL=//CRMAppServerMachine:9000
ig.isc.CRMNODENAME.userid= opuserId
ig.isc.CRMNODENAME.password= opuserIPwd (encrypted password)
ig.isc.CRMNODENAME.toolsRel=CRM Tools version (8.48 for CRM 9)
```

CRMNODENAME is the PeopleSoft CRM default local node name (for example, PSFT\_CR).

## Verifying the Local Gateway Properties

To verify the local Gateway properties:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Search for the Integration Gateway ID.

URL format: `http://<CRM machine_name>:<port>/PSIGW/PeopleSoftListeningConnector`

---

**Note.** Local Gateway properties are set up during the PeopleSoft CRM 9 installation.

---

## Verifying the Required Routings if Defined in Local Node

To verify the required routings:

1. Select PeopleTools, Integration Broker, Node Definitions.
2. Search for the default local node (for example, PSFT\_CR).
3. Select the Routings tab and ensure that the routings shown in the following page are defined and active:

Node Definitions

Connectors

Portal

WS Security

**Routings**


**Node Name:**

PSFT\_CR

**Routing Name:**

Add

**Routing Definitions**

Customize | Find | View 100 |  First 543-552 of 600 Last

Name	Service Operation	Service Operation Version	Routing Type	Sender Node	Receiver Node	Status
~GENERATED~29261_RY_XMSG_AREQ		VERSION_1	Asynch	~ANY~	PSFT_CR	Active
~GENERATED~27910_RY_XMSG_SREQ		VERSION_1	Synch	~ANY~	PSFT_CR	Active

Default Local Node page

## Setting Up the Student Administration External Node and Connector

To set up the PeopleSoft SA external node and connector:

1. Select PeopleTools, Integration Broker, Node Definitions.
2. Search for the node PSFT\_HR.
3. Ensure that the Active Node check box is selected.
4. Configure the node connection as follows:
  - a. Select the Connectors tab, and ensure that the Connection ID is set to *PSFTTARGET* for PeopleSoft SA 8.9, or *PSFT81TARGET* for PeopleSoft SA 8 SP1.

Example of Connectors tab:

Node Definitions | **Connectors** | Portal | WS Security | Routings

**Node Name** PSFT\_HR Ping Node

**Details**

**Gateway ID** LOCAL 🔍 PeopleSoft Nodes are configured via the [Gateway Setup Properties](#)

**Connector ID** PSFTTARGET 🔍

This connector does not have properties. Use Gateways Page to setup.

Save Return to Search

[Node Definitions](#) | [Connectors](#) | [Portal](#) | [WS Security](#) | [Routings](#)

Connectors page

- b. Click the Gateway Setup Properties link, enter the user ID and password, and click OK.
  - c. Set the URL value to that of the PeopleSoft SA local gateway for the PSFT\_HR node.
  - d. The URL format is `http:// <SA_machinename>:<port>/servlets/gateway`.
5. Click OK.
6. Click Save.
7. Click the Routings tab to ensure that all of the routings are active and verify that the required routings are defined for this PeopleSoft SA node.

Node Definitions | Connectors | Portal | WS Security | **Routings**

**Node Name:** PSFT\_CR Add

**Routing Name:**

[Routing Definitions](#) Customize | Find | View 10 | 📄 First 101-200 of 772 Last

Selected	Name	Service Operation	Service Operation Version	Routing Type	Sender Node	Receiver Node	Status
<input type="checkbox"/>	~GEN~UPG~18738	CS_ADM_APPL_DATA_FULLSYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR	Active
<input type="checkbox"/>	~GEN~UPG~22311	CS_ADM_PRSPCT_DATA_FULLSYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR	Active
<input type="checkbox"/>	~GEN~UPG~11269	CS_APPL_BIO_SYNC	VERSION_1	Asynch	PSFT_CR	PSFT_HR	Active
<input type="checkbox"/>	~GEN~UPG~25659	CS_EMAIL_NOTICE	VERSION_1	Asynch	PSFT_CR	PSFT_HR	Active
<input type="checkbox"/>	~GEN~UPG~15250	CS_PERS_DATA_EXTEND_FULLSYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR	Active
<input type="checkbox"/>	~GEN~UPG~22168	CS_PRFL_ATTR_CHOICES_FULLSYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR	Active
<input type="checkbox"/>	~GEN~UPG~10301	CS_SCRTY_APPL_CTR_FULLSYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR	Active
<input type="checkbox"/>	~GEN~UPG~21127	CS_SCRTY_RECR_CTR_FULLSYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR	Active
<input type="checkbox"/>	~GEN~UPG~20091	CS_STUDENT_BOID_SYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR	Active
<input type="checkbox"/>	~GEN~UPG~17075	CS_STUDENT_TOPIC_SYNC	VERSION_1	Asynch	PSFT_CR	PSFT_HR	Active
<input type="checkbox"/>	CS_T189_ROUTING	CS_T189_ADM_APPL_SYNC	VERSION_1	Asynch	PSFT_CR	PSFT_HR	Active
<input type="checkbox"/>	~GEN~UPG~10562	CS_TEST_SCORES_FULLSYNC	VERSION_1	Asynch	PSFT_HR	PSFT_CR	Active

Routings page

## Testing the PeopleSoft CRM Default Local Node

To test (ping) the PeopleSoft CRM default local node:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Node Status.
2. In the Message Node Name field, enter the PeopleSoft CRM default local node (for example, PSFT\_CR).
3. Click the Ping Node button and verify that *Success* appears in the Message Text column.

**Node Status**

Scheduled System Pause Times For Local Node: PSFT\_CR

**Asynchronous Pause Time** [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#) [Add Pause](#)

Start Day	Start Time	End Day	End Time

[Test Node](#)

**Ping a Node to Determine Its Availability**

**Node Name:**  [Ping Node](#) [Transaction Retry Queue](#)

**Node Information**

Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

Node Status page for PeopleSoft CRM local node

## Testing the PeopleSoft SA Node

To test (ping) the PeopleSoft SA node:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Node Status.
2. In the Message Node Name field, enter the PeopleSoft SA default local node (for example, SA890CR2 or SA801CR2).
3. Click the Ping Node button and verify that *Success* appears in the Message Text column:

**Node Status**

Scheduled System Pause Times For Local Node: PSFT\_CR

**Asynchronous Pause Time** [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#) [Add Pause](#)

Start Day	Start Time	End Day	End Time

[Test Node](#)

**Ping a Node to Determine Its Availability**

**Node Name:**  [Ping Node](#) [Transaction Retry Queue](#)

**Node Information**

Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

Node Status page for PeopleSoft SA local node

## Activating the Domain

To activate the domain:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.

2. In the Domains grid, ensure that the Domain Status of the machine of gateway is set to *Active*.  
If it is not, select *Active*, click the Update button, and then click Refresh.

## Task 11-2-2: Setting Up the Web Template URL in the PeopleSoft CRM Database

To set up the web template URL to a valid template file location in the PeopleSoft CRM database:

1. Select Set Up CRM, Product Related, Online Marketing, Template Setup.
2. Enter *PSUSI* in the SETID field and click the Search button.
3. For each Template ID with prefix “CS” in the description field, do the following:
  - a. Open the template.
  - b. Replace the *<DES Server>:<port>* with the valid DES server in the URL.

URL format: `http://<DES Server>:<port>/DCS/Sample/SA/templates/GLAKE_Undergrad.html`

## Task 11-2-3: Assigning Valid Mailbox Email Addresses

To assign valid mailbox email addresses:

1. Select Set Up CRM, Product Related, Online Marketing, Mailbox Setup.
2. Assign valid email addresses to each of these mailboxes:

MAILBOX	Mailbox Type	Forwarding Address
<a href="#">10000</a>	Normal	from@changeme.com
<a href="#">10001</a>	Bounced	bounce@changeme.com
<a href="#">10002</a>	Normal	reply@changeme.com

Mailbox Setup Search page

## Task 11-2-4: Defining SETID for Inbound EIP Data

To define inbound data SETID:

1. Select Main Menu, Set Up CRM, Common Definitions, Customer, Customer Installation Options.
2. Enter *PSUSI* in the Default SetID for Inbound EIPs field, and then click Save.

**Customer Data Management System Options**  
System Settings

<input checked="" type="checkbox"/> <b>Search for CM Before Adding</b>	This feature allows you to search for an existing contact method based on all the fields you provide for a new contact method. If an exact match is found, then instead of adding a new Contact Method, the existing one will be used as a reference.
<input checked="" type="checkbox"/> <b>Show Contact Method Search</b>	This feature allows the user of the Customer Data Management components to enter contact method information into the page and then search for matching contact methods. If this option is not selected, the Search button will not be shown on the Edit Contact Method pages.
<input checked="" type="checkbox"/> <b>Process Basic Data Summary</b>	This feature will update the basic data tables and override the setting for the role. The basic data tables are used by PeopleSoft CRM Online Marketing, the data import process, and PeopleSoft CRM Mobile. The checkbox must be selected when these products are installed.
<input checked="" type="checkbox"/> <b>Secure Quick Create Access</b>	This feature restricts access to the Quick Create functionality based on the user's security access to the Customer Data Model components, as defined by the user's Permission List.
<input type="checkbox"/> <b>Enable Binds for Oracle</b>	This feature enables the BO Search SQL generation for the Oracle platform utilizing bind variables. If unchecked, search criteria value are embedded into the SQL string and bind variables are not used.
<input type="checkbox"/> <b>SCM Integrated Through EIP</b>	

**Default SetID for Inbound EIPs**

► **Mobile Customer Options**

**Modified** 01/15/2003 7:56PM PST CVP1

Customer Data Management System Options page

## Task 11-2-5: Setting Up the FTP Server for the PeopleSoft Student Administration Database

### Understanding the FTP Server Setup

When the applicant uploads a file attachment to the PeopleSoft CRM system, it is stored on an FTP server that is defined in the PeopleSoft CRM system. The (student-side) PeopleSoft CRM Post File Attachment/Long Text Application Engine process gets the address of the PeopleSoft CRM system FTP server from the URL table and copy that file to a PeopleSoft SA system FTP server, that also must be defined in the URL table.

---

**Important!** Complete all of the steps in this section on the PeopleSoft SA database.

---

### Defining the PeopleSoft CRM FTP Server

To define the PeopleSoft CRM FTP Server:

1. For PeopleSoft SA 8 SP1, select Home, PeopleTools, Utilities, Use, URL Maintenance.  
For PeopleSoft SA 8.9, select Home, PeopleTools, Utilities, Administration, URLs.
2. Click Add a New Value.
3. Specify the URL Identifier, for example, *CRM\_SERVER*. (This identifier can be any value.)
4. Click Add.

5. Enter *CRM FTP Server* in the Description field.
6. Enter the URL of the FTP server, for example: *ftp://user2:pwd2@ftp.crmserver.com/files/*.

## Defining the PeopleSoft Student Administration FTP Server

To define the PeopleSoft SA FTP server:

1. For PeopleSoft SA 8 SP1, select Home, PeopleTools, Utilities, Use, URL Maintenance.  
For PeopleSoft SA 8.9, select Home, PeopleTools, Utilities, Administration, URLs.
2. Select Add a New Value.
3. Specify the URL identifier.  
For example: *SA\_SERVER*. (This identifier can be any value.)
4. Click Add.
5. Enter *SA FTP Server* in the Description field.
6. Enter the URL: *ftp://user2:pwd2@ftp.saserver.com/files/*.

---

**Note.** The previous FTP address is an example of a valid FTP address. The actual value depends on the FTP address and login information for the Student-side FTP server.

---

## Defining New URL IDs on the Application Center Table

Two new fields in the Application Center table identify the PeopleSoft CRM FTP Server URL ID and the PeopleSoft SA FTP Server URL ID. Repeat this procedure for each Application Center that is loaded on the PeopleSoft CRM system side.

To define new URL IDs on the Application Center table:

1. For PeopleSoft SA 8 SP1, select Home Design Student Administration, Design Admissions, Setup, Application Center Table.  
For PeopleSoft SA 8.9, select Set Up SACR, Product Related, Recruiting and Admissions, Applicants, Application Center Table.
2. Enter the Application Center, for example, *UGRD*.  
*UGRD* is an example of an Application Center. This value is dependent on the user setup data and the application centers that are being used by the applications that are loaded through the PeopleSoft CRM system.
3. Enter the Student FTP Server ID as *SA\_SERVER* (or whichever URL\_ID was created in the URL table for the student-side server).  
See Defining the PeopleSoft Student Administration FTP Server.
4. Enter the PeopleSoft CRM FTP Server ID as *CRM\_SERVER* (or whichever URL\_ID was created in the URL table for the CRM-side server).

See Defining the PeopleSoft CRM FTP Server.

## Task 11-2-6: Populating Profile Attribute Choices from PeopleSoft Student Administration to PeopleSoft CRM

To run the process in the PeopleSoft SA database:



---

**Note.** Complete the procedure in this task on the PeopleSoft SA database.

---

1. For PeopleSoft SA 8 SP1, select Home, Define Business Rules, Manage Integration Rules, Process, Full Data Publish.  
For PeopleSoft SA 8.9, select Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish.
2. Enter a run control ID.
3. Enter a request ID.
4. Enter a description.
5. Select Process Frequency, *Once*.
6. Select Message Name *CS\_PRFL\_ATTR\_CHOICES\_FULLSYNC*.

## Task 11-2-7: Cleaning Up and Resetting Profile-Related Data Integrity in the PeopleSoft CRM Database

After populating the profile attribute choices from PeopleSoft SA to PeopleSoft CRM, you must confirm data integrity. Run the PeopleSoft Data Mover scripts to clean up the attribute choice IDs.

To run the PeopleSoft Data Mover scripts to clean up the attribute choice IDs:

1. Open the PeopleSoft Configuration Manager.
2. Select the Profile tab and click the Edit button for the Default profile.
3. Select the Common tab.
4. Set the Input Directory in PeopleSoft Data Mover Directories to *<PS\_HOME>\data* (for example, *c:\Tools\data*, or *\\networkmachine\Tools\data*, or *//unixMountDir/Tools/data*).
5. Click OK.
6. Click OK again.
7. Save the configuration setting.
8. Open the script file *olmsaresetids.dms* from *<PS\_HOME>\scripts* in PeopleSoft Data Mover.
9. Select File, Run Script.
10. Recycle the application server and clear the application server cache.
11. Recycle the Dialog Execution Server (DES).

## Task 11-2-8: Activating PeopleSoft CRM Profiles in the PeopleSoft CRM Database

To activate PeopleSoft CRM profiles in the PeopleSoft CRM database:

1. Select Set Up CRM, Common Definitions, Profile Management, Profile Definitions.
2. Activate the 23 profiles shown on the Profile Definitions page by opening the profile, changing the status to Activated, and then saving.

**Note.** For the profile status Requested, first click the Transfer to Approve Profile link.

<a href="#">CS-ADM Academic Address</a>	User	Many rows	CS-ADM Academic Address	Requested
<a href="#">CS-ADM Applicant Data</a>	User	Many rows	CS-ADM Applicant Data	Requested
<a href="#">CS-ADM Applicant Plan</a>	User	Many rows	CS-ADM Applicant Plan	Requested
<a href="#">CS-ADM Applicant Program</a>	User	Many rows	CS-ADM Applicant Program	Requested
<a href="#">CS-ADM Applicant Recruiter</a>	User	Many rows	CS-ADM Applicant Recruiter	Requested
<a href="#">CS-ADM Applicant Sub-Plan</a>	User	Many rows	CS-ADM Applicant Sub-Plan	Requested
<a href="#">CS-ADM Extracur Activity</a>	User	Many rows	CS-ADM Extracur Activity	Requested
<a href="#">CS-ADM Service Indicators</a>	User	Many rows	CS-ADM Service Indicators	Requested
<a href="#">CS-ADM Test Results</a>	User	Many rows	CS-ADM Test Results	Requested
<a href="#">CS-PRS Prospect Career</a>	User	Many rows	CS-PRS Prospect Career	Requested
<a href="#">CS-PRS Prospect Plan</a>	User	Many rows	CS-PRS Prospect Plan	Requested
<a href="#">CS-PRS Prospect Program</a>	User	Many rows	CS-PRS Prospect Program	Requested
<a href="#">CS-PRS Prospect Recruiters</a>	User	Many rows	CS-PRS Prospect Recruiters	Requested
<a href="#">CS-PRS Prospect Sub-Plan</a>	User	Many rows	CS-PRS Prospect Sub-Plan	Requested
<a href="#">CS-Person</a>	User	One row	CS-Person	Requested
<a href="#">Customer Segment</a>	User	One row	Customer Segment	Requested
<a href="#">Privacy Options</a>	User	One row	Privacy Options	Requested
<a href="#">CS-Appl Academic</a>	User	One row	Applicant Academic	Update
<a href="#">CS-Appl Academic Documents</a>	User	One row	Applicant Academic Documents	Update
<a href="#">CS-Appl Academic History</a>	User	One row	Applicant Academic History	Update
<a href="#">CS-Appl Biographic</a>	User	One row	Applicant Biographical Data	Update
<a href="#">CS-Appl Employment</a>	User	One row	Applicant Employment History	Update
<a href="#">CS-Appl Honors Awards Extra Curr</a>	User	One row	Applicant Honors Awards Extra Curr	Update
<a href="#">CS-Appl Parents Emerg Contact</a>	User	One row	Applicant Parent & Emerg Contact	Update

Profile Definitions page

## Task 11-2-9: Populating Student Data from PeopleSoft Student Administration to PeopleSoft CRM

### Creating Run Control for Student Data

To create Run Control for student data:

**Note.** Complete this task on the PeopleSoft SA database.

1. For PeopleSoft SA 8 SP1, select Define Business Rules, Manage Integration Rules, Process, Full Data Publish.

For PeopleSoft SA 8.9, select Main Menu, Enterprise Components, Initiate Processes, Full Data Publish.

2. Enter the run control ID, for example: SAD\_CRM\_INTEGRATION.
3. For PeopleSoft SA 8 SP1, enter a row (using + ) with these values:

Request ID	Description	Process Frequency	Message Name
001	Person Basic Data	Once	CS_PERSON_BASIC_FULLSYNC

4. For SA 8.9, enter a row (using + ) with these values:

Request ID	Description	Process Frequency	Message Name
001	Person Basic Data	Once	PERSON_BASIC_FULLSYNC

5. For both SA 8 SP1 and SA 8.9, enter rows (using + ) with these values:

Request ID	Description	Process Frequency	Message Name
002	Extend Pers Data	Once	CS_PERS_DATA_EXTEND_FULLSYNC
003	Applicant Data	Once	CS_ADM_APPL_DATA_FULLSYNC
004	Prospect Data	Once	CS_ADM_PRSPCT_DATA_FULLSYNC
005	Test Score Data	Once	CS_TEST_SCORES_FULLSYNC
006	Application Center Security	Once	CS_SCRTY_APPL_CTR_FULLSYNC
007	Recruiting Center Security	Once	CS_SCRTY_RECR_CTR_FULLSYNC

6. Save the run control.

## Running the Integration

To run the PeopleSoft SA to PeopleSoft CRM Full Sync Integration:

---

**Note.** Complete this task on the PeopleSoft SA database.

---

- For PeopleSoft SA 8 SP1, select Home, Design Student Administration, Manage CRM Integration, Process, Populate ID Control Table.  
For PeopleSoft SA 8.9, select Set Up SACR, Product Related, Recruiting and Admissions, Manage CRM Integration, Populate ID Control Table.
- Enter a run control ID.
- Enter the lower limit date for applicant data.
- Enter the lower limit date for prospect data.
- Enter the lower limit date for test scores.

The dates that you enter on this page are used to create a control list of EMPL IDs that are integrated with PeopleSoft CRM. Only applicants and prospects that you create on or after the dates specified are considered for integration with PeopleSoft CRM. In addition, only test scores loaded on or after the test score as-of date are loaded into PeopleSoft CRM.

## Monitoring Messages

After the integration process runs and the control table loads, the FULLSYNC messages publish to the PeopleSoft CRM node. You can monitor these messages from the Message Monitor.

To monitor messages:

1. For PeopleSoft SA 8 SP1, select Home, PeopleTools, Application Message Monitor, Use, Application Message Monitor.  
For PeopleSoft SA 8.9, select Home, People Tools, Integration Broker, Monitor Integrations, Monitor Message.
2. From the Publish Contracts tab, you can monitor these messages by clicking the Details link next to each message:
  - CS\_PERSON\_BASIC\_FULLSYNC (PeopleSoft SA 8SP1 only)
  - PERSON\_BASIC\_FULLSYNC (PeopleSoft SA 8.9 only)
  - CS\_PERS\_DATA\_EXTEND\_FULLSYNC
  - CS\_ADM\_APPL\_DATA\_FULLSYNC
  - CS\_ADM\_PRSPCT\_DATA\_FULLSYNC
  - CS\_TEST\_SCORES\_FULLSYNC
  - CS\_SCRTY\_APPL\_CTR\_FULLSYNC
  - CS\_SCRTY\_RECR\_CTR\_FULLSYNC

## Task 11-2-10: Modifying the Audience To Be Secured on an Operator

Define an operator-secured audience to enforce that data access in PeopleSoft CRM is consistent with data access in PeopleSoft SA.

---

**Note.** This task can be done only after you populate Student Data from PeopleSoft SA to PeopleSoft CRM.

---

All of the PeopleSoft SA demo audience is delivered as *not* operator secured audience. Make these audiences operator secured so that only this operator, who signed into PeopleSoft Pure Internet Architecture, can communicate to this audience (defined as contacts). The audiences CS\_GLAKE\_UGRD\_CAMPEVENT, CS\_GLAKE\_UGRD\_CAMPUS\_VISIT1, CS\_GLAKE\_UGRD\_CAMPUS\_VISIT2 and CS\_GLAKE\_UGRD\_HOUSING\_SURVEY are designed for the PeopleSoft SA Dialog and should be operator-secured. You should perform the following steps for these four audiences.

To make an existing audience operator-secured:

1. Sign into PeopleSoft Pure Internet Architecture using a valid PeopleSoft SA user in PeopleSoft CRM.  
A valid PeopleSoft SA user in PeopleSoft CRM is a user that exists in both PeopleSoft CRM and PeopleSoft SA.
2. Select Sect Marketing, Manage Audiences.
3. Enter *PSUSI* in the SetID field and click Search.
4. Open an audience that you want to be secured by this user.
5. Click the Edit Selection Criteria button.
6. Click the Next Step button.
7. Modify any Operator row, and then click Save.

---

**Note.** For any new audiences, that you create by clicking the Add Audience button or the Clone button, the audience is secured automatically by the current operator unless the that operator is *not* a PeopleSoft SA user.

---

## Task 11-2-11: Deploy CS\_ Dialogs to Start Dialog Execution

To execute the dialog, you must first deploy all of the CS\_ Dialogs to *live*. After the dialogs are live, the invitation emails are sent to prospects and applicants. Once prospects and applicants respond and complete the Student/Applicant Application Dialog, the system sends the Student Person Data from PeopleSoft CRM to PeopleSoft SA TS189 Staging tables.

## Task 11-2-12: Running the TS189 Processes to Post Data (Optional)

After data has been loaded into the PeopleSoft SA TS189 Staging tables, along with the Application Messages from the PeopleSoft CRM system, the data must be run through the existing TS189 Org Search, TS189 People Search/Match/Post, and PeopleSoft CRM Post File Attachments/Long Text Responses processes.

---

**Important!** Running the TS189 processes to post data is *optional* and should be performed on the PeopleSoft SA database.

---

To run the TS189 processes to post data:

1. For PeopleSoft SA 8 SP1, select Home, Develop Enrollment, Process External Data, Proc E-F, EDI TS189 Org Search.  
For PeopleSoft SA 8.9, select Main Menu, Student Admissions, Application/Transcript Loads, Organization Search Process.
2. Enter a run control ID.
3. Click Run.
4. Verify that the Process Name is *ADAPPORG*.
5. Click OK.
6. For PeopleSoft SA 8 SP1, select Home, Develop Enrollment, Process External Data, Proc E-F, EDI TS189 People Search/Post.  
For PeopleSoft SA 8.9, select Main Menu, Student Admissions, Application/Transcript Loads, Search/Match/Post Process.
7. Enter a run control ID.
8. Enter appropriate values for the EDI TS189 People Search/Post processes.
9. Click Run.
10. Depending on whether the user has set up security to enable the Job Definition or the Process Definition, select the process or job to be run: ADAPPST, SAD\_CRM\_SYN2 (new Application Engine), or ADCRMPST (Job for both processes).

---

**Note.** The SAD\_CRM\_SYN2 process must be run after the ADAPPST process, regardless of whether it is run as an individual process or as the Job.

---

## Task 11-2-13: Posting Dialog Questions from PeopleSoft CRM to PeopleSoft Student Administration in the PeopleSoft CRM Database (Optional)

To post a current active dialog topic to PeopleSoft SA:

---

**Note.** This process is *optional* and can be run as often as necessary. Perform this step on the PeopleSoft CRM database.

---

1. Select Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish.
2. Create a new run control ID.
3. For the Message Name, enter *CS\_STUDENT\_TOPIC\_SYNC*.
4. For the Request ID, enter a value.
5. For Process Request, select *Once*, and click Run.
6. Select the row for Process Name *EOP\_PUBLISHT* and click OK.
7. Verify the process from the Process Scheduler Monitor and Message Monitor.

## CHAPTER 12

# Installing BPEL and Deploying BPEL Processes

This chapter discusses:

- Understanding Oracle's PeopleSoft/BPEL Integration
- Installing and Configuring Oracle's BPEL Process Manager
- Selecting and Installing the Software
- Applying Patches
- Configuring and Tuning BPEL Process Manager
- Restarting the Instance
- Recording Access Information
- Creating and Configuring a BPEL Domain
- Configuring PeopleSoft for BPEL Integration
- Deploying CRM BPEL Processes

---

## Understanding Oracle's PeopleSoft/BPEL Integration

This chapter explains the steps necessary to configure Oracle's PeopleSoft/BPEL integration for PeopleSoft Enterprise Customer Relationship Management (CRM) 9 applications. You perform these steps after you have successfully completed the installation of PeopleSoft PeopleTools, as described in the Enterprise PeopleTools 8.48 Installation guide for your database platform, and the CRM Applications, as described in "Installing CRM 9 Applications."

BPEL is widely used by Order Capture, Sales, and FSI. Call Center is BPEL-enabled, but none of its functionality is dependant on BPEL in CRM 9.

Oracle's PeopleSoft/BPEL integration involves two primary technologies: PeopleSoft Integration Broker and Oracle's BPEL Process Manager. Both of these technologies must be configured. This chapter covers a simple configuration of the PeopleSoft/BPEL integration.

It is possible to obtain the BPEL Process Manager (PM) from two different sources: JDeveloper Install and the Oracle OAS Middle-tier Install (version 10.1.2.0.2). The JDeveloper BPEL PM is used more for development and unit testing, but it can also be used for a simple environment with minimum workload.

The PeopleSoft Integration Broker configuration can be complex. In a production environment, for example, you should separate the service operation requests on a dedicated PeopleSoft environment (accessing the same database so that interactions by users through PIA do not affect the performance of service operation fulfillment). However, for a simple environment, it is possible to have the Integration Broker application services share the PIA application servers.

---

## Installing and Configuring Oracle's BPEL Process Manager

The following tasks detail the process for installing and configuring Oracle's BPEL PM.

---

### Task 12-1: Selecting and Installing the Software

The BPEL PM is part of two different products: the 10.1.2.0.2 JDeveloper installation and the Oracle Middle Tier OAS installation (10.1.2.0.2). JDeveloper is for simple testing and BPEL Development, while the middle-tier should be used for a production environment. The BPEL PM found with JDeveloper can be used for simple environments with minimal workload. For any other environment, you should use the OAS Middle Tier. The JDeveloper BPEL PM is available with minimal setup requirements, while the OAS Middle Tier requires additional planning for installation. The software is available on Oracle's Software Site: <http://otn.oracle.com/bpel>.

Please review the installation documentation for your selected software and perform the installation of the software in accordance with the corresponding installation guide.

While installing the BPEL PM environment and the PeopleSoft Enterprise environment, please make sure to note the installation directories you selected for the install. Throughout the remainder of this chapter, the BPEL PM installation directory is referred to as <BPEL\_PM\_HOME> and the PeopleSoft Enterprise installation directory is referred to as <PSHOME>.

---

**Note.** If you are running the BPEL PM in an environment that requires proxy servers, please make sure that you have followed the instructions for configuring your BPEL PM (and supporting command line environments) for a proxy environment.

---

#### See Also

*Enterprise PeopleTools 8.48 Installation for <your database platform>*

*Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Broker*

*Oracle JDeveloper Install Guide*

*Oracle Application Server Integration Installation Guide for Oracle BPEL Process Manager*

---

### Task 12-2: Applying Patches

While the Oracle Middle Tier OAS installation (10.1.2.0.2) and/or JDeveloper (10.1.2.0.2) provide the core functionality necessary to integrate BPEL with Oracle's PeopleSoft system, these additional patches must be installed:

- Issues with "&," in deployed WSDL Files (4896525).
- Security and Callback Mechanism (5139817).



BPEL integration patches (whether specific to BPEL PM or Oracle's PeopleSoft BPEL integration) are available via Customer Connection using this path: <ftp://ftp.peoplesoft.com/outgoing/ptools/Oracle/BPEL>. The previously listed patches should be applied before you activate any BPEL processes via the Oracle PeopleSoft BPEL integration. You should apply all available patches before you deploy the PeopleSoft BPEL processes.

---

## Task 12-3: Configuring and Tuning BPEL Process Manager

This section discusses:

- Understanding the BPEL Process Manager Configuration and Tuning Process
- Adjusting the JTA Transaction Timeout
- Tuning the JVM
- Changing the ORABPEL Schema for Worklist Integration

### Understanding the BPEL Process Manager Configuration and Tuning Process

This task primarily involves the BPEL PM found as part of the Oracle OAS Middle Tier product. The Middle Tier requires a special configuration need, which is extensive and not covered here.

See *Oracle Application Server Integration Installation Guide for Oracle BPEL Process Manager*.

### Task 12-3-1: Adjusting the JTA Transaction Timeout

The BPEL engine uses JTA to achieve the atomicity. By default, the transaction timeout value is set to 60000 milliseconds in the server.xml file (30000 milliseconds in the app server). For the developer edition, this file is located at <BPEL\_PM\_HOME>/system/appserver/oc4j/j2ee/home/config/server.xml.

Users may experience transaction rollback errors due to timeouts, especially when the BPEL engine is under stress. The timeout can occur for many reasons, such as:

- Insufficient resources; not enough database connections in the connection pool, the engine thread waits for 60 seconds and throws a timeout error, and so on.
- Large document manipulation; the database writes very large documents that may take longer than 60 seconds.

The line in the server.xml file appears as follows:

```
<transaction-config timeout="60000" />
```

A value of 300000 milliseconds is recommended.

---

**Note.** The remaining steps of this task are primarily for the Middle Tier environment. If you are using the JDeveloper BPEL PM, you may skip to task 12-4.

---

## Task 12-3-2: Tuning the JVM

The heap size controls how much memory the JVM can use. The initial value is 256 megabytes. The `-XX:+AggressiveHeap` option inspects the machine resources (size of memory and number of processors) and attempts to set various parameters to optimize long running jobs that require a large memory allocation.

The garbage collector optimizes collection by classifying objects by how long they live. Most of the objects of the BPEL engine are short-lived, thus they live in the Eden space. You should size the Eden space to be 60 to 70 percent of the total heap size. Here are the JVM command line options used:

```
-Xms1024m -Xmx1024m -Xmn614m -XX:+AggressiveHeap
```

To change the Java command line options for an OC4J Instance, go to the OC4J Instance homepage and perform the following steps:

1. Stop the OC4J Instance.
2. Drill down to the Server Properties page.
3. In the Command Line Options area of the Server Properties page, under the heading Multiple VM Configuration, set the Java options.

For example, enter the following to set the JVM initial and maximum heap sizes to 2048 megabytes and, for garbage collection, set the Eden space to 60 percent of heap size:

```
-Xms2048m -Xmx2048m -Xmn1228m
```

4. If using two or more CPUs, set the `-XX:+AggressiveHeap` jvm flag adjacent to the preceding command.
5. Click the Apply button to apply the changes.
6. Start the OC4J Instance.

### Multiple VM Configuration

#### Islands

Remove

Related Links

Virtual Machine Metrics

Select	Island ID	Number of Processes
<input checked="" type="radio"/>	default_island	2
<input type="radio"/>	tester	2

Add Another Row

#### Ports

RMI Ports	3101-3200
JMS Ports	3201-3300
AJP Ports	3001-3100

#### Command Line Options

Java Executable	
OC4J Options	-properties
Java Options	-Xms128m -Xmx128m

#### Configuration File Paths

RMI Configuration File	./rmi.xml
JMS Configuration File	./jms.xml

Revert

Apply

Example of setting Java heap size for an OC4J Instance Using Application Server Control

You should set your maximum Java heap size so that the total memory consumed by all of the JVMs running on the system does not exceed the memory capacity of your system. If you select a value for the Java heap size that is too large for your hardware configuration, one or more of the OC4J processes within the OC4J Instance may not start, and Oracle Enterprise Manager Application Server Control will report an error. Review the log files for the OC4J Instance in the directory <BPEL\_PM\_HOME>/opmn/logs to find this error report: Could not reserve enough space for object heap.

### Task 12-3-3: Changing the ORABPEL Schema for Worklist Integration

To support the PeopleSoft BPEL Worklist integration, the PROPERTIES column in the DLV\_MESSAGE table (found in the ORABPEL schema) must be increased in size. The default column width is 1000 characters. This column needs to be altered to be able to hold at least 2000 characters.

For example, using a SQL tool, you could use the following SQL statement to change the column size:

```
alter table ORABPEL.DLV_MESSAGE modify PROPERTIES varchar2(2000)
```

---

**Note.** The column width of 2000 characters is only a starting point. If your worklist integration exchanges large amounts of data, 2000 characters may not be sufficient. A maximum column size of 4000 characters can be configured.

---

---

## Task 12-4: Restarting the Instance

You must reboot the machine or restart the Middle Tier instance for all configuration settings to take effect. Please see the OAS Middle Tier documentation to perform this operation.

If the JDeveloper's BPEL PM is used, merely stopping and restarting the BPEL Process Manager is all that is required. For example, in a Microsoft environment you would select Start / Programs / <your installation name given at install time> / Oracle BPEL Process Manager 10.1.2 / Stop BPEL PM Server (waiting for the BPEL PM to shutdown) followed by Start / Programs / <your installation name given at install time> / Oracle BPEL Process Manager 10.1.2 / Start BPEL PM Server.

Please make sure your BPEL PM has completed its initialization before you start the next steps.

---

## Task 12-5: Recording Access Information

At this point, note the host and port information used to access your BPEL PM. This information is used later when you configure the BPEL processes for deployment. The host and port information is the same as that used when accessing the BPEL Console. For example, the default URL for accessing the BPEL Console from a JDeveloper installation is as follows:

`http://yourhostname:9700/BPELConsole`

where *hostname* is *yourhostname* and the port is *9700*. For the JDeveloper BPEL PM, the port is always 9700; however, the port used by the Middle Tier product is configurable.

---

## Task 12-6: Creating and Configuring a BPEL Domain

This section discusses:

- Understanding BPEL Domain Creation and Configuration
- Creating a New BPEL Domain
- Setting the auditLevel of the Domain

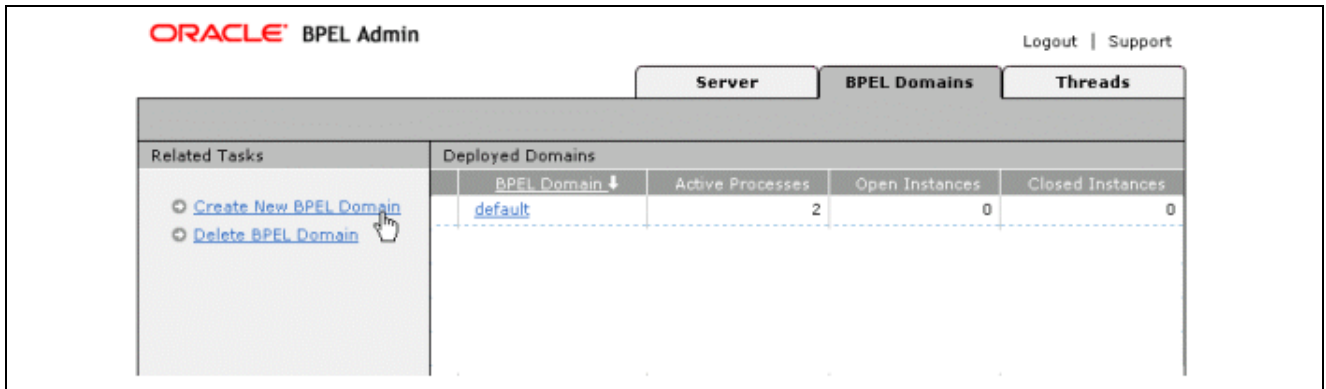
### Understanding BPEL Domain Creation and Configuration

This step involves creating a BPEL domain to which the CRM BPEL processes will be deployed. It is possible to use the default domain (which is delivered with the BPEL PM installation); however, you should create a new BPEL domain for this installation.

**Note.** At this point, the BPEL PM must be available in order perform the following steps. The BPEL PM must be started prior to creating the BPEL domain and remain available throughout the BPEL deployment process.

## Task 12-6-1: Creating a New BPEL Domain

Through the BPEL Administrator console (<http://yourhostname:port/BPELAdmin>), select the BPEL Domains tab and select Create New BPEL Domain:



BPEL Admin - BPEL Domains page

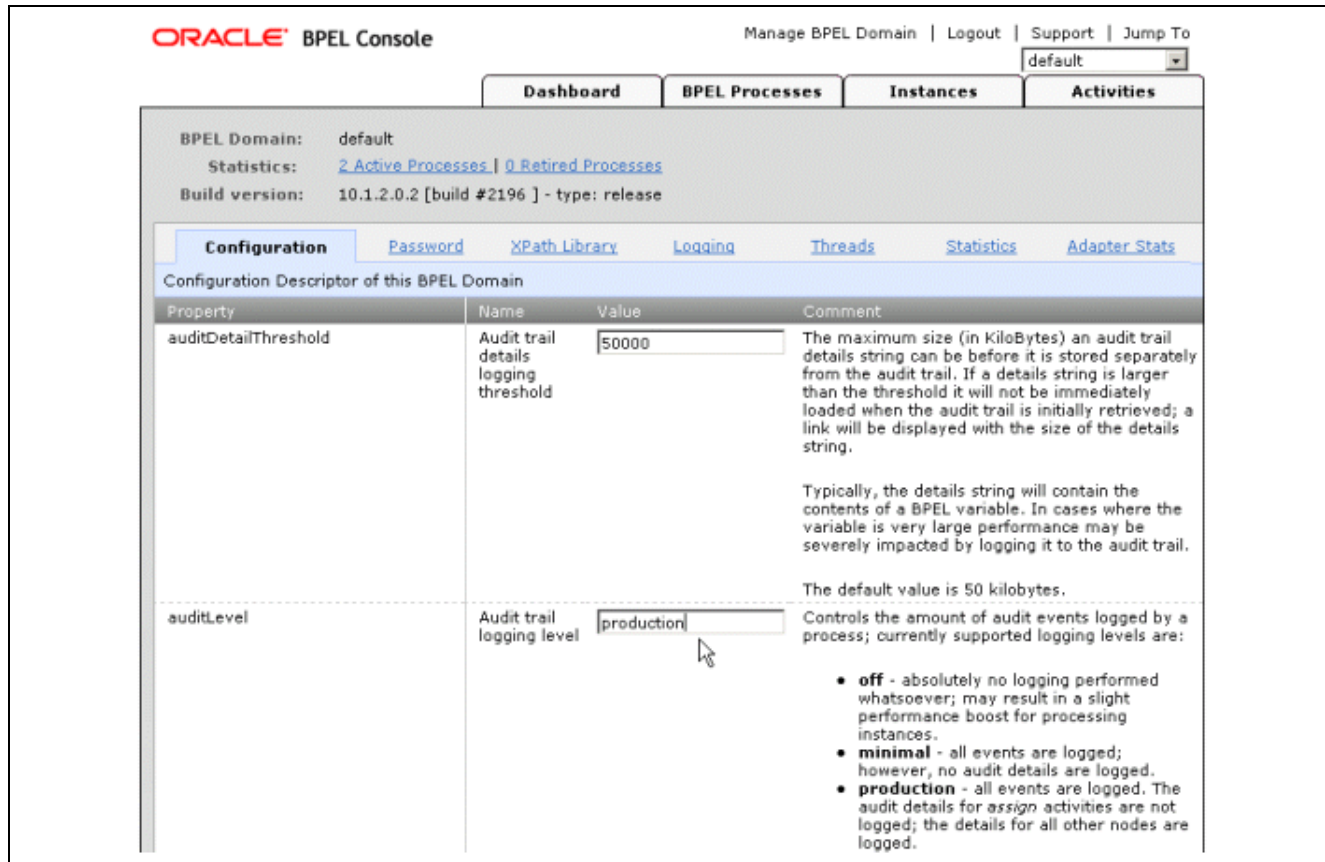
Create an installation domain and note both the domain ID and the password that you specify (these values are used later in the PeopleSoft configuration). Use the default values populated in the other fields on the Create New BPEL Domain page. Once you select the Create button, a pop-up window appears asking for data confirmation. Select the OK button to confirm and wait for the window indicating that the creation of the new domain is complete.

**Note.** If you cannot connect to the BPEL Administrator console, the most likely cause is that the BPEL Process Manager has not been started. Make sure that the BPEL Process Manager is available throughout the installation process.

## Task 12-6-2: Setting the auditLevel of the Domain

This property controls the number of audit events logged by a process. It affects performance because of the additional auditing events inserted into the database for a process. This audit information is only for viewing purposes from BPEL Console to show the state of the process. The default value of this configuration property is *development*. This value should be changed to *production*. With this value, all events are logged. The audit details for <assign> activities alone are not logged.

To perform this operation, log into the domain via the BPEL Console (<http://yourhostname:port/BPELConsole>) and select the Manage BPEL Domain link at the top of the page. On the Configuration tab, edit the auditLevel property and set it to *production*. Click Apply to activate the settings:



BPEL Console - Configuration page

## Task 12-7: Configuring PeopleSoft for BPEL Integration

This section discusses:

- Understanding PeopleSoft Configurations for BPEL Integration
- Configuring a Special PeopleSoft Server Environment
- Configuring the Integration Broker Gateway
- Confirming Access to Integration Broker
- Configuring Enterprise Service Settings
- Configuring the BPEL Node
- Updating the BPEL Process End Points
- Configuring the PeopleSoft Worklist Web Service
- Activating Web Services
- Configuring the PeopleSoft BPEL End User Monitor
- Restarting PeopleSoft Enterprise Environment
- Verifying Simple Access to Integration Broker

## Understanding PeopleSoft Configurations for BPEL Integration

While not a requirement for a simple environment, you should configure a special application/web server environment as a dedicated environment for providing CRM services. This setup ensures that user interaction with the PIA environment does not affect the performance of the service operations. However, for simple environments, it is acceptable to use the default local Integration Broker Gateway and the application servers used by the PIA.

---

**Note.** The remainder of the installation steps requires the PIA environment to be available. Administrators must be able to log into the environment to configure the PeopleSoft Integration Broker. Also, the deployment process performed on the BPEL PM requires access to the PeopleSoft service details, which are accessed via the PeopleSoft Integration Broker. Please make sure that the PeopleSoft environment is completely available throughout the remainder of the installation.

---

### Task 12-7-1: Configuring a Special PeopleSoft Server Environment

In this step, we configure a special web and application server environment to provide PeopleSoft services.

---

**Note.** You can skip this step if the existing PeopleSoft environment used by the PIA users is to be used by service operations.

---

#### See Also

*Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Broker*

### Task 12-7-2: Configuring the Integration Broker Gateway

The delivered BPEL processes expect the application server where the PeopleSoft Services are executed to be the default application server for the Integration Broker Gateway associated with the URL used for service operations. To configure the default application server, navigate to PeopleTools > Integration Broker > Configuration > Gateways.

If you are creating a special application server for service operations, create a new gateway with the hostname/port URL configured as part of the previous task . If you are using a single application server environment, confirm the Local gateway URL for proper configuration:

The screenshot shows the 'Gateways' configuration page. It includes a 'Gateway ID' field with the value 'BPELGW'. Below it are two unchecked checkboxes: 'Local Gateway' and 'Load Balancer'. The 'URL' field contains the text 'http://rtas069.peoplesoft.com:8000/PSIGW/PeopleSoftListeningConnec'. To the right of the URL field is a yellow 'Ping Gateway' button. At the bottom left, there is a blue link labeled 'Gateway Setup Properties'.

Gateways page

Go to the Gateway Setup Properties page (follow the instructions on the page to log in), and configure the default application server for the application server you are using:

PeopleSoft Node Configuration page

See the PeopleSoft guide for configuring the Integration Broker on how to set up a gateway.

### Task 12-7-3: Confirming Access to Integration Broker

Once the environment is configured, you should be able to ping the Integration Broker gateway by using the host/port information for the environments application server. From a browser, you should be able to type the following type of URL:

`http://yourhostname:port/PSIGW/PeopleSoftListeningConnector`

If you see the following output in the browser, the Integration Broker is available for further configuration:

PeopleSoft Integration Gateway status output

**Note.** Please remember the hostname and port information for your Integration Broker, as it will be used later to configure the BPEL processes for deployment.

### Task 12-7-4: Configuring Enterprise Service Settings

In this step, you will change the default service configurations by navigating to PeopleTools > Integration Broker > Configuration > Service Configuration. On this page, change:

- Service Namespace to “urn:oracle.enterprise.crm.service”
- Schema Namespace to “urn:oracle.enterprise.crm.data”
- Target Location to “http://yourhostname:port/PSIGW/PeopleSoftServiceListeningConnector”

This is an example of the resulting page:

Service Configuration page

**Note.** The Target Location URL uses “PeopleSoftServiceListeningConnector” contrary to the “PeopleSoftListeningConnector,” which was used as part of the Integration Broker setup.



## Task 12-7-5: Configuring the BPEL Node

The Integration Broker node, called BPEL, is used to communicate with the BPEL engine and must be configured properly to point to the BPEL PM. To do this, navigate to PeopleTools > Integration Broker > Integration Setup > Nodes and open the BPEL node. Once on that page, select the Properties link, and then enter the following information:

- BPEL Console URL (used earlier to configure the domain)
- BPEL Domain (target deployment domain)
- BPEL Domain Password

This is an example of the resulting page:

**Node Properties**

Node Name: BPEL

Properties

	*Name Type	*Property Name	Value	Comment
1	Category	BPELCONSOL	http://myBPELPM:9700/BPELConsole	
2	Category	BPELDOMAIN	CRMDOMAIN	
3	Category	BPELDOMAINI	bpel	

OK Cancel

Node Properties page

## Task 12-7-6: Updating the BPEL Process End Points

The delivered services have end point addresses which use the tokens <host: id> and <domain> in the URL. These must be replaced with the actual end point for the BPEL PM environment being configured. A special convenience utility is available for replacing all of the service routings for the designated node to point to the environment information configured in the previous task.

To configure the BPEL process end point addresses, navigate to Set Up CRM > Common Definitions > Business Process > Infrastructure > Update End Point Addresses. Once on that page, enter *BPEL* in the Node field and press Continue (after reviewing the BPEL PM hostname and port information in the Base URL field as well as the BPEL domain value in the Domain field).

**Update End Points**

\*BPEL Node: BPEL

Base URL: <http://myBPELPM.peoplesoft.com:9700>

Domain: CRMDOMAIN

☐ Replace All (Untokenized Messages also)

Continue

Update End Points page

If you make a mistake or your environment changes and you need to update all service routings associated with the BPEL node, select the Replace All check box before clicking Continue to update all message routings whether tokenized (as mentioned earlier) or not.

## Task 12-7-7: Configuring the PeopleSoft Worklist Web Service

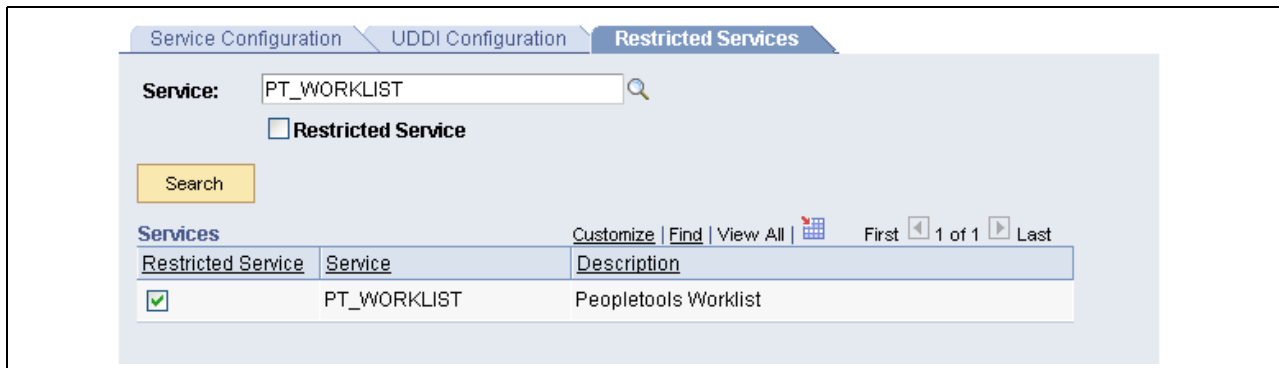
To enable PeopleSoft Worklist web service to pass BPEL process-specific parameters when creating a new worklist in the PeopleSoft application and to send a worklist outcome response back to the BPEL process that created the worklist, the CRM part messages must be included in the Worklist web service operation message containers. This configuration is required for a new installation as well as whenever the modified version of the worklist service container messages are delivered through a PeopleTools upgrade.

Once the correct CRM part messages are included in the corresponding PeopleTools-delivered web service operation containers, you must regenerate the schema.

To include CRM part messages in the Worklist web service operation message container:

1. Remove the restriction on PT\_WORKLIST web service to enable an update of its data.

PT\_WORKLIST web service is delivered restricted, which prevents users from updating its configuration setting. To update its content, navigate to PeopleTools, Integration Broker, Configuration, Service Configuration, and then select the Restricted Service tab. Type in *PT\_WORKLIST* and then click Search. Clear the Restricted Service check box for the PT\_WORKLIST web service, and save the page. Return to the Service Configuration page and verify that the service system status is set to *Development*:



Restricted Services page

2. Add RBB\_CREATE\_WORKLIST message part to the PT\_WL\_CREATE\_REQUEST\_CONT message container.

---

**Note.** If the RBB\_CREATE\_WORKLIST message part is already present in PT\_WL\_CREATE\_REQUEST\_CONT, you may skip this step.

---

- a. To add a part message to the container message, you must first generate the schema of the part message. To generate the schema of the part message, navigate to PeopleTools, Integration Broker, Integration Setup, Messages and search for RBB\_CREATE\_WORKLIST. Go to the Schema page and click the Build Schema button. Confirm the namespace value by clicking the OK button; the system will generate the message schema:

Schema page

- b. Navigate to PeopleTools, Integration Broker, Integration Setup, Messages and search for the PT\_WL\_CREATE\_REQUEST\_CONT message container. Click the Add Parts link and select the RBB\_CREATE\_WORKLIST message and message version number. Designate a sequence number greater than the one assigned to the PT\_WL\_CREATE\_REQUEST\_CONT message along with the parameters shown in the following example. Finally, save the page to generate the schema of the reconfigured message container:

Message Name	Message Version	Sequence	Minimum Occurs	Maximum Occurs	*Unbound Maximum
PT_WL_CREATE_REQUEST	v1	1	1	1	N
RBB_CREATE_WORKLIST	v1	2	1	1	N

RBB\_CREATE\_WORKLIST part message in the PT\_WL\_CREATE\_REQUEST\_CONT container message

3. Register the CRM handler, RBBHandler, to the CREATE\_WORKLIST\_ITEM service operation.

To use the CRM handler to process web service requests for creating the worklist, the PeopleTools NOTIFY handler must be disabled and the CRM handler must be registered using the following steps:

---

**Note.** If the RBBHandler is already present with an Active status and the PeopleTools NOTIFY handler is Inactive, you can skip this step.

---

- a. Navigate to PeopleTools, Integration Broker, Integration Setup, Services and search for PT\_WORKLIST.
- b. Click the CREATE\_WORKLIST\_ITEM operation link to open the operation details.
- c. Go to the Handlers page.
- d. Set the status of the PeopleTools NOTIFY handler to *Inactive* and add the CRM-specific handler, RBBHandler, with a status of *Active*. Note that the ACK handler is delivered by PeopleTools and should be active at all times. Save the page:

**Service Operation:** CREATE\_WORKLIST\_ITEM  
**Default Version:** V1  
**Operation Type:** Asynch Request/Response

**Handlers** Customize | Find | View All | First 1-3 of 3 Last

*Name	*Type	*Implementation	*Status		
ACK	OnReceive	App Class	Active	Details	+ -
NOTIFY	OnNotify	App Class	Inactive	Details	+ -
RBBHandler	OnNotify	App Class	Active	Details	+ -

Handlers page

- e. Click the Details link in the RBBHandler row, enter the action detail parameters shown in the following example, and then save the page:

**Action Details**

**Handler Name:** RBBHandler  
**Handler Type:** OnNotify  
**Description:** RBB Worklist Handler  
**Comments:**  
**Handler Owner:** RBB

**Application Class**

**\*Package Name:** RBB\_WS\_WORKLIST  
**\*Path:** Business  
**Class ID:** NotificationHandler  
**Method:** OnNotify

OK Cancel

Action Details page

4. Add RBB\_OUTCOME\_RESPONSE message part to the PT\_WL\_CREATE\_RESPONSE\_CONT message container.

**Note.** If the RBB\_OUTCOME\_RESPONSE message part is already present in PT\_WL\_CREATE\_RESPONSE\_CONT, you may skip this step.

- a. To generate the schema for the RBB\_OUTCOME\_RESPONSE part message, navigate to PeopleTools, Integration Broker, Integration Setup, Messages and search for RBB\_OUTCOME\_RESPONSE. Go to the Schema page, and click the Build Schema button. Click the OK button to confirm the namespace. The system will generate the message schema:

Message Definition Schema

**Message:** RBB\_OUTCOME\_RESPONSE **Updated:** 06/19/2006 10:42:12AM

**Version:** v1

**Namespace:**

[Build Schema](#)

Schema page

- b. Navigate to PeopleTools, Integration Broker, Integration Setup, Messages and search for the PT\_WL\_CREATE\_RESPONSE\_CONT message container. Click the Add Parts link and select the RBB\_OUTCOME\_RESPONSE message. Designate a sequence number greater than the one assigned to PT\_WL\_CREATE\_RESPONSE\_CONT message and enter the parameters shown in the following example. Save the page to regenerate the schema of the reconfigured message container:

[Service Operation References](#)  
[Add Parts](#)

Customize | Find | View All | First 1-2 of 2 Last

Message Name	Message Version	Sequence	Minimum Occurs	Maximum Occurs	*Unbound Maximum
<a href="#">PT_WL_CREATE_RESPONSE</a>	v1	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	N
<a href="#">RBB_OUTCOME_RESPONSE</a>	v1	<input type="text" value="2"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	N

[Save](#) [Save As](#)

RBB\_OUTCOME\_RESPONSE part message in the PT\_WL\_CREATE\_RESPONSE\_CONT container message

5. Regenerate the WSDL of the PT\_WORKLIST web service.

**Note.** If you skipped steps 2 and 4 in this task, skip this step and continue.

- Navigate to PeopleTools, Integration Broker, Web Services, Provide Web Services and type *PT\_WORKLIST* for the service name. Click Search, and then click the NEXT button.
- Select both CREATE\_WORKLIST\_ITEM.v1 and GETWLINSTANCE.v1 service operations and click the NEXT button.
- Review the new WSDL, and then click the NEXT button to publish the WSDL.
- Click the Finish button to publish the new WSDL to the PeopleSoft WSDL Repository.



Confirm Results page

- e. Generate the SOAP template by clicking the Generate SOAP Template button.
6. Change the Service System Status to *Production* and restrict the PT\_WORKLIST web service to prevent unauthorized updates.

Once CRM part messages are successfully added to the PeopleTools worklist message containers and their corresponding schema and WSDLs are generated correctly, restrict users from updating the service data by restricting access to the PT\_WORKLIST web service. To restrict access, navigate to the Restricted Services page (see step 1) and select the Restricted Service check box. Save the page.

## Task 12-7-8: Activating Web Services

### Understanding Web Service Activation

This task discusses how to activate the required web services to support the BPEL process deployment and runtime operations. Three categories of web services must be activated for the complete BPEL integration: PeopleTools, BPEL Infrastructure, and application-specific. You must activate PeopleTools and BPEL Infrastructure web services during this installation step; however, you can defer application-specific web service activation.

### Activating Web Services

To activate web services:

1. Navigate to PeopleTools, Integration Broker, Integration Setup, Service Operations. Enter the service operation you want to activate in the Service Operation field and press Search. Select the service operation from the results area.

2. On the General page that appears, select the Active field.

---

**Note.** For asynchronous operations, remember the queues in the Message Information section. These queues can be placed in a Running state in a later step.

---

3. On the Handlers page, make sure that any handler listed is set to *Active* (with the exception of the CREATE\_WORKLIST\_ITEM service operation, which was discussed in a previous task).
4. On the Routings page, make sure that the listed routing is active (if multiple routings exist, only one should be active). If the routing for the service operation does not have a status of *Active*, select the routing to be activated (use the first routing if multiple routings exist) and press the Activate Selected Routings button.
5. Click Save to store your changes.
6. For asynchronous service operations only, navigate to PeopleTools, Integration Broker, Service Operations Monitor, Administration, Queue Status. On the Queue Status page, make sure that the service operation is using a queue that is in *Running* status. If the queue is not running, click the corresponding Run button.

You can find the name of the queue that an asynchronous service operation uses on the General page for that service operation.

---

**Note.** Make sure that the handlers and routings are activated for the service operations. Activating the service operation does not automatically activate the corresponding handlers or routings. Also, if an operation, handler, routing, or queue is already active, no action is required for that item.

---

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Working with Business Processes and Web Services.”

## Confirming PeopleTools Web Service Availability

For basic BPEL process deployment and typical BPEL process operations, the following PeopleTools Service Operations (and their corresponding routings) must be activated:

- CREATE\_WORKLIST\_ITEM
- GETROUTINGS
- GETSCHEMA
- GETWLINSTANCE
- GETWSDL
- GETWSIL
- GETXSLT
- SAVEXSLT

The following corresponding Integration Broker Queues should also be in a *Running* state:

- IB\_CHNL
- IB\_GENERIC
- WORKLIST\_CHNL
- WSDL\_QUEUE

To verify whether a queue is running:

- Navigate to PeopleTools > Integration Broker > Service Operations Monitor > Queue Status.

- Click the Find link in the Queues grid.
- Enter the queue name in the Search field and click OK.
- Make sure that the Status column shows the status of *Running* for that queue. If the status is *Paused*, click the *Run* button next to the status.

## Activating BPEL Infrastructure Web Services

Common web services that are used across the applications are considered part of the BPEL infrastructure. These service operations should be activated:

- RBB\_HOUSEKEEPING\_SO
- RBBSYNCPROCESS
- INITIATESAMPLEWORKLIST
- INITIATESTRUCTUREDWORKLIST
- INITIATEUNSTRUCTUREDWORKLIST
- INITSAMPLESTRUCTUREDWORKLIST

The RBB\_QUEUE queue must also be set to a Running state. If the queue state is Paused, follow the previous steps to start the queue.

## Activating Application-Specific Web Services

You activate the web services for your particular applications last. The activation of these web services is not required for the BPEL integration installation. You can perform these activations after your environment is configured. Please refer to your application-specific PeopleBooks for the list of web service operations to be activated.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Delivered Web Services and Service Operations.”

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Delivered Web Services and Service Operations.”

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Business Object Delivered Web Services.”

See *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, “Delivered Web Services and Service Operations.”

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Order Capture Delivered Business Processes and Web Services.”

See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Delivered Business Processes and Web Services.”

See *PeopleSoft Enterprise Sales 9 PeopleBook*, “Sales Delivered Business Processes and Web Services.”

See *PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook*, “Delivered Web Services and Service Operations.”

See *PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook*, “Delivered Web Service and Service Operations.”

See *PeopleSoft Enterprise Policy and Claims Presentment 9 PeopleBook*, “Delivered Web Services and Service Operations.”



## Task 12-7-9: Configuring the PeopleSoft BPEL End User Monitor

This task discusses how to enable the PeopleSoft BPEL End User monitor and copy files from the BPEL PM environment to the PeopleSoft environment.

JNDI access is required to the BPEL PM to support the PeopleSoft BPEL End User Monitor feature and other minor features. The information for JNDI was part of the configuration performed when you set up the BPEL PM. Using that information, you will configure the PeopleSoft application to access the BPEL PM.

A number of files must be copied over from the BPEL PM environment into the PeopleSoft environment. These files are not included as part of the PeopleSoft installation, but they should be copied not only during the initial installation of the BPEL integration but any time updates are applied to the BPEL PM environment to ensure that the most current BPEL files are used.

To configure JNDI access:

1. Navigate to Set Up CRM > Common Definitions > Business Process > Infrastructure > JNDI Details:

*BPEL Node	*ORMI URL	*ORMI Port	*Username	*Password
BPEL	ormi://myBPELPM.peoplesoft.com/orabpel	23791	admin	*****

JNDI Details page

Configure the BPEL node JNDI access by entering the following information:

- Enter *BPEL* for the BPEL Node.
  - Use the *ormi://<host>/orabpel* format for the ORMI URL. Note that no port information is specified.
  - Enter *23791* for the ORMI Port unless you changed the ORMI port during the Middle Tier installation.
  - Enter the username and password information for JNDI (not the BPEL domain). The defaults are *admin* and *welcome*, respectively.
2. Once you have entered the data, click Save to store your changes.

To copy BPEL support files:

Copy the files in this table from the BPEL PM environment into the <PSHOME>/class directory:

Filename	Directory
bpm-infra.jar	<BPEL_PM_HOME>/integration/orabpel/lib
bpm-services.jar	
dms.jar	
orabpel.jar	
orabpel-boot.jar	
orabpel-common.jar	
orabpel-thirdparty.jar	
xmlparserv2.jar **	

Filename	Directory
activation.jar ** bcel.jar ejb.jar jaas.jar javax77.jar jdbc.jar jms.jar jmxri.jar jta.jar mail.jar ** servlet.jar	<BPEL_PM_HOME>/integration/orabpel/system /appserver/oc4j/j2ee/home/lib (for jdeveloper)  <i>or</i> <BPEL_PM_HOME>/j2ee/home/lib (for middle-tier)
oc4jclient.jar	<BPEL_PM_HOME>/integration/orabpel/system /appserver/oc4j/j2ee/home (for jdeveloper)  <i>or</i> <BPEL_PM_HOME>/j2ee/home (for middle-tier)
classes12dms.jar	<BPEL_PM_HOME>/integration/orabpel/system /appserver/oc4j/jdbc/lib (for jdeveloper)  <i>or</i> <BPEL_PM_HOME>/jdbc/lib (for middle-tier)
ojdl.jar	<BPEL_PM_HOME>/integration/orabpel/system /appserver/oc4j/diagnostics/lib (for jdeveloper)  <i>or</i> <BPEL_PM_HOME>/diagnostics/lib (for middle-tier)
optic.jar	<BPEL_PM_HOME>/integration/jdev/opmn/lib (for jdeveloper – may not be available)  <i>or</i> <BPEL_PM_HOME>/opmn/lib (for middle-tier)

\*\* indicates jar files in <PS\_HOME>/class with the same name as PeopleSoft jar files that should *not* be overwritten.

---

**Warning!** Do not overwrite the PeopleSoft jar files in the <PSHOME>/class directory with the BPEL PM jar files.

---

## Task 12-7-10: Restarting PeopleSoft Enterprise Environment

Once the configuration changes are completed, restart the PeopleSoft Enterprise environment for the settings to take effect. All facilities of the PeopleSoft environment (the application server, web server, and process scheduler) should be restarted. The configuration of the PeopleSoft Enterprise environment is complete.

## Task 12-7-11: Verifying Simple Access to Integration Broker

Once the PeopleSoft environment has been restarted, a simple test to access a service's Web Service Definition Language (WSDL) can be performed to see if the basic information required by the BPEL deployment tasks are available. From a web browser on the BPEL PM machine, type in the following URL address:

`http://yourhostname:port/PSIGW/PeopleSoftServiceListeningConnector/PT_WORKLIST.1.wsdl`

The result should display an XML document with the top level tag element of `<wsdl:definitions>`. Any other result means that the PeopleSoft system is not correctly configured. Validate that your Integration Broker settings are correct and that all components of the PeopleSoft system (application servers and webservers) are available.

---

## Task 12-8: Deploying CRM BPEL Processes

This section discusses:

- Understanding CRM BPEL Process Deployment
- Copying BPEL Process Files
- Configuring BPEL Process Files for Deployment
- Deploying All BPEL Processes

### Understanding CRM BPEL Process Deployment

This section discusses the actual initial deployment of all PeopleSoft CRM BPEL processes onto the BPEL PM.

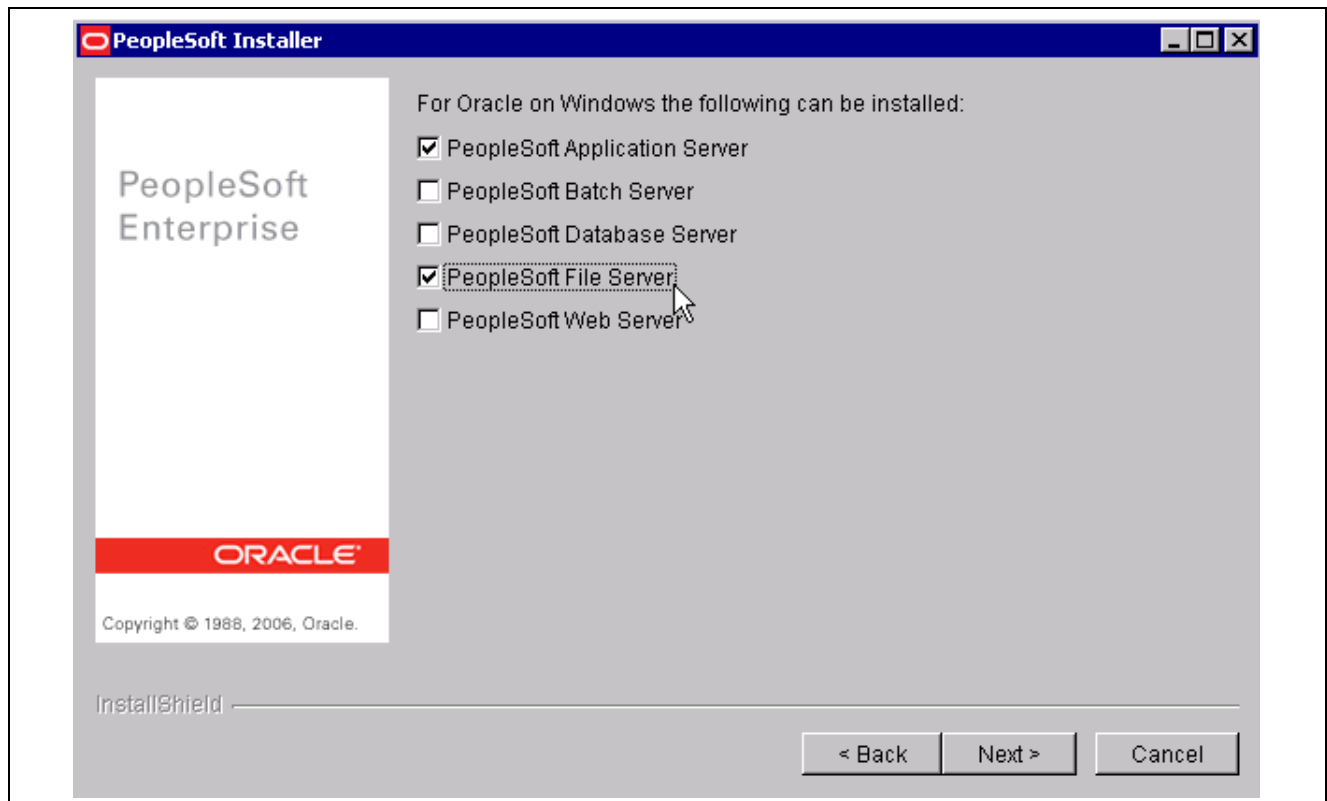
---

**Note.** This step cannot be completed until all previous tasks have been completed and BOTH the BPEL PM and PeopleSoft Integration Broker are available.

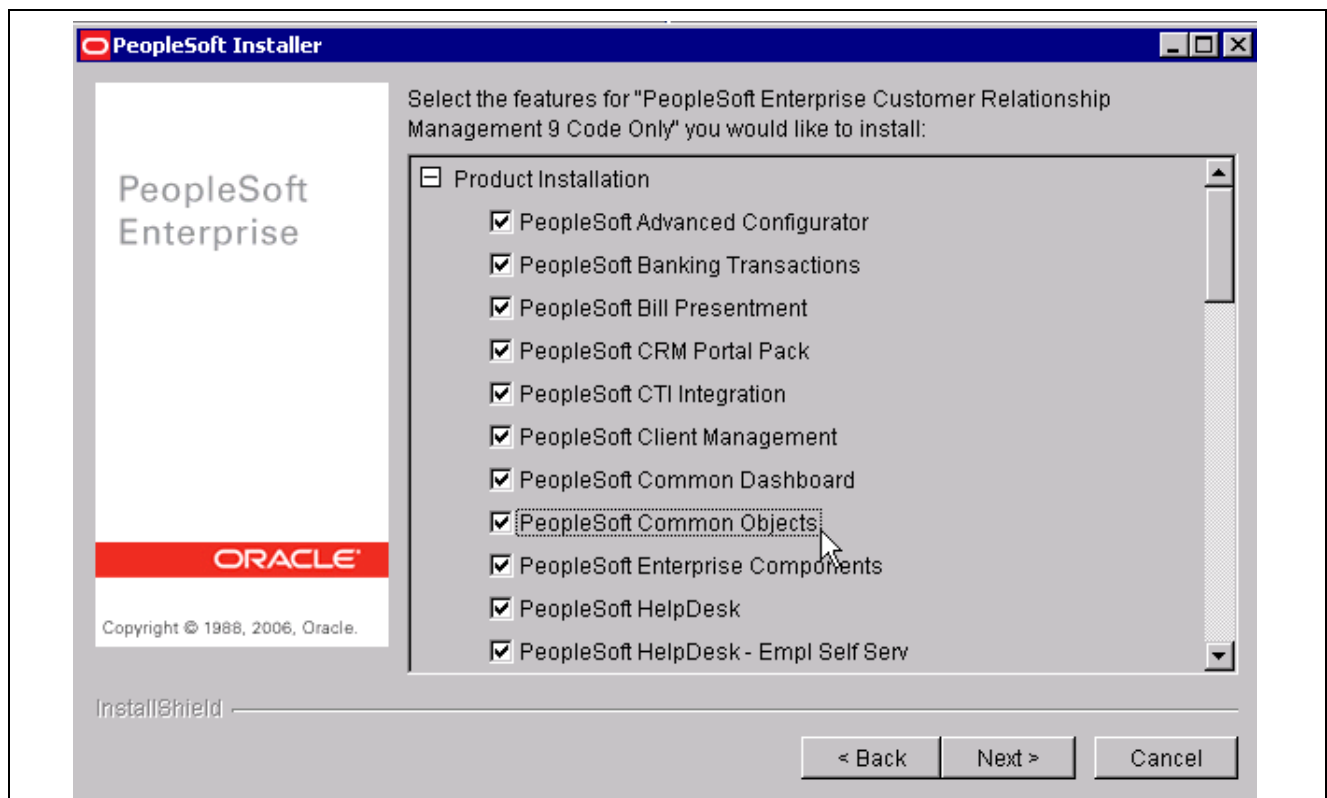
---

### Task 12-8-1: Copying BPEL Process Files

Under the PeopleSoft Enterprise installation directory (PSHOME) is a directory called `bpel`. This directory was created during the PeopleSoft installation when these installation options were selected: PeopleSoft File Server and PeopleSoft Common Object. These two examples show the options selected:



Example of the Peoplesoft Installer page with the PeopleSoft File Server option selected



Example of the Peoplesoft Installerpage with the PeopleSoft Common Objects option selected

The `bpel` directory contains the BPEL process source files as well as supporting files to be used to deploy the BPEL processes to your target BPEL PM machine. These files need to be copied to the BPEL PM. On your BPEL PM machine, create a new directory in `<BPEL_PM_HOME>/integration/orabpel` named *peoplesoft*. Then copy the contents of the `<PSHOME>/bpel` directory to the `<BPEL_PM_HOME>/integration/orabpel/peoplesoft` directory on your target BPEL PM machine. Once the copy is completed, the contents of the *peoplesoft* directory should be the same as those of the *bpel* directory.

The remainder of the steps in this section are performed on the BPEL PM machine.

## Task 12-8-2: Configuring BPEL Process Files for Deployment

### Edit `install.properties`

This step involves editing a file called `install.properties` located in `<BPEL_PM_HOME>/integration/orabpel/peoplesoft`. This file is used to create a set of deployable files for the environment you have created. The delivered file appears as follows:

```
install.ps-host=<Integration Broker Host>
install.bpel-host=<your bpelpm machine>
install.bpel-port=80
install.bpel-domain=default
```

You must specify the following:

- `install.ps-host`: The hostname and port (if specified) used to access the PeopleSoft Integration Broker.
- `install.bpel-host`: The BPEL PM hostname only (current machine name).
- `install.bpel-port`: The BPEL PM port only (default for JDeveloper is 9700).
- `install.bpel-domain`: The BPEL domain created for deployment of CRM processes.

### Create Deployable BPEL Files

This step creates a new folder structure to be used for the actual BPEL deployment. These files have the correct end point addresses for your configured environment entered in the `install.properties` file.

To perform these steps, first open the Oracle BPEL PM Developer Prompt. This special window has many environmental properties already configured. Please see your BPEL PM documentation on how to start the Developer Prompt. For example, on a Microsoft environment, when you select `Start / Programs / <your installation name given at install time> / Oracle BPEL Process Manager 10.1.2 / Developer Prompt`, a command window will appear.

In the Developer Prompt, change the directory to `<BPEL_PM_HOME>/integration/orabpel/peoplesoft` directory. Enter the following command:

```
obant install
```

Once completed, a new directory, named `crm_<date-time>`, is created. The directory name is listed in the output produced by the previous command.

## Task 12-8-3: Deploying All BPEL Processes

As the final step, you will deploy the BPEL processes to the BPEL domain created previously. To do this, change your directory to the newly created `crm_<date-time>` directory and execute the following command in the Developer Prompt window:

```
obant
```

At the conclusion of this command, all processes should be deployed into the target domain. If errors occur during deployment, confirm that both the BPEL PM and PeopleSoft systems are available. You can try to deploy a single process by typing in the following:

```
obant processName
```

where processName is the name of a directory in the `crm_<date-time>` directory. If the problem persists, verify that both systems are not only available but have no errors. You may need to restart the systems.

## CHAPTER 13

# Installing the Natural Language Processor (Banter)

This chapter discusses:

- Downloading the PeopleSoft NLP Web Service
- Setting Up the Virtual Web Site
- Validating the .NET Runtime Environment
- Granting Access to Banter Server
- Test Web Service from Browser
- Setting Up the FTP Site
- Configuring PeopleSoft Web Service Application Environment

The Natural Language processor is used by Multichannel Framework and Call Center products in PeopleSoft Customer Relationship Management (PeopleSoft CRM).

---

### Task 13-1: Downloading the PeopleSoft NLP Web Service

To download the PeopleSoft NLP web service:

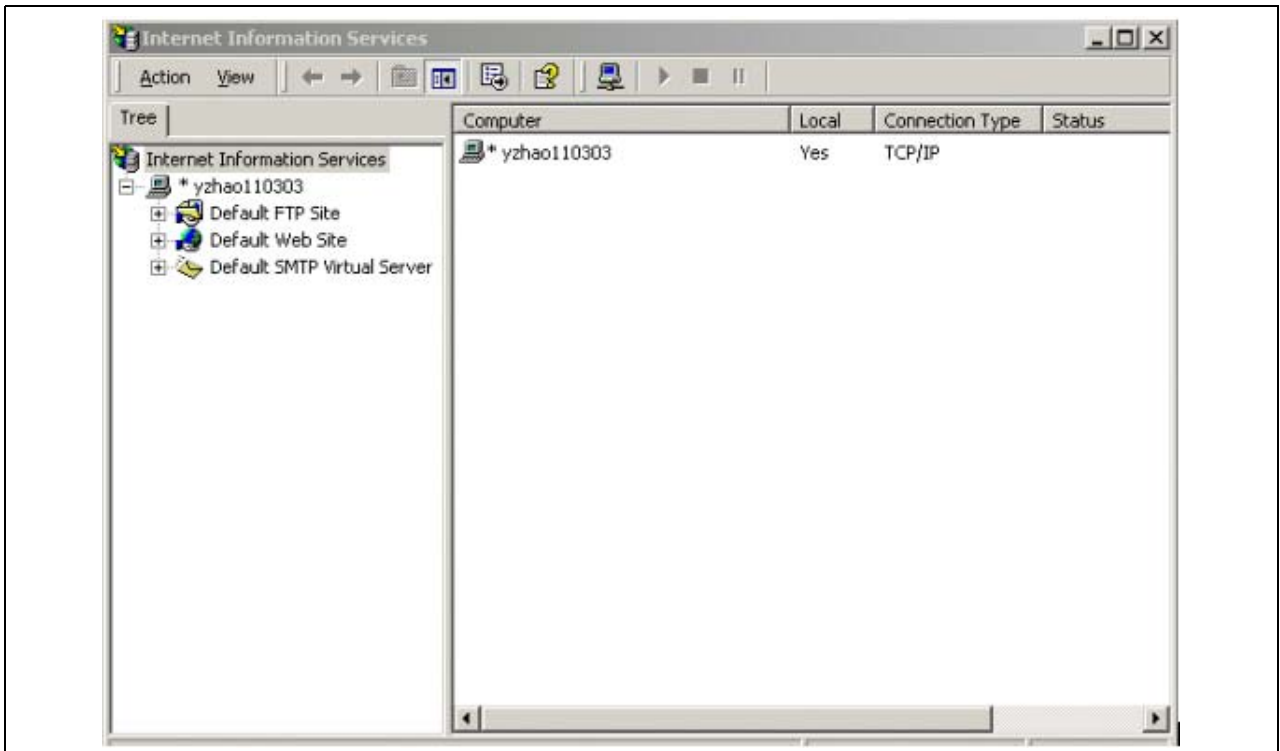
1. Copy the delivered PeopleSoft web service ZIP file into a local temporary directory.
2. Run the self-executing zip file and extract all files into the installation directory of the local machine. You should save these files on the local machine and not on a network directory.
3. Using the directory explorer, find the directory where CRM\_UAD\_PTUPGRADE project file is located.
4. In the Select Project from the List Below area, click CRM\_UAD\_PTUPGRADE entry and click the Select button.
5. In the Copy From File window, click the Copy button to copy project file objects into the target database.

---

### Task 13-2: Setting Up the Virtual Web Site

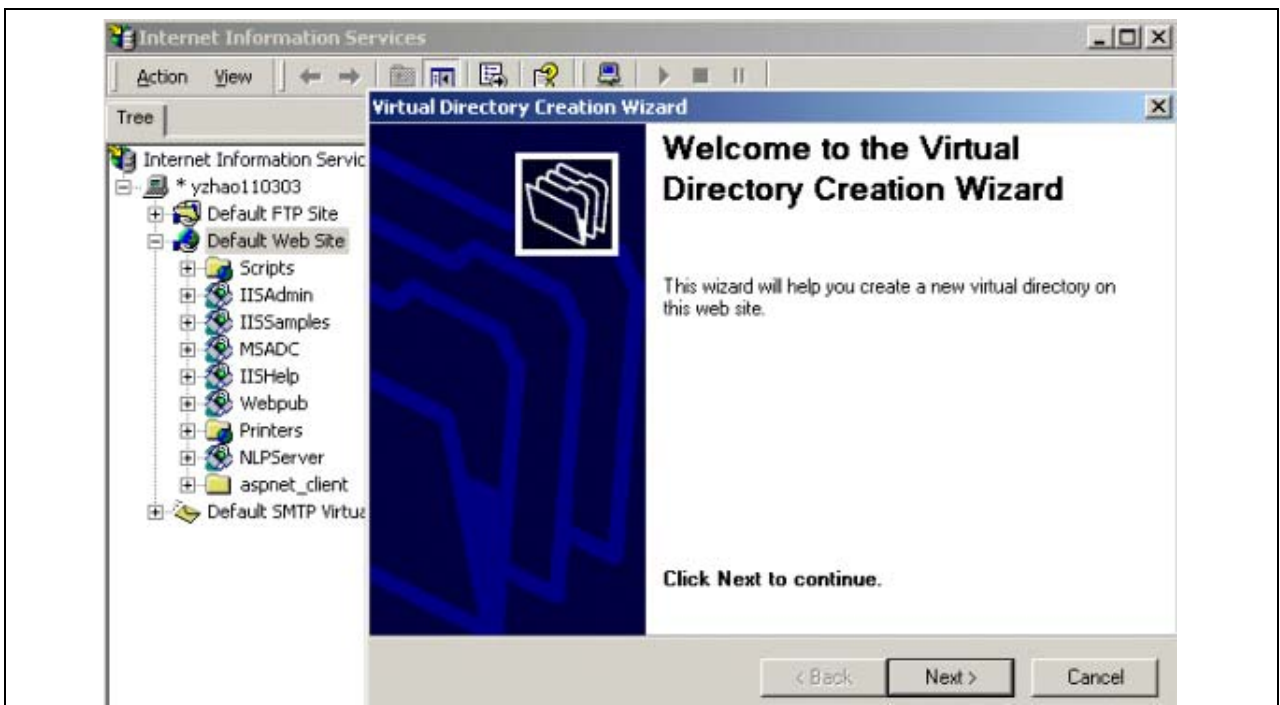
To set up the virtual web site:

1. From the Windows desktop, navigate to Control Panel, Administrative Tools, Internet Service Manager. The following page will appear:



Internet Service Manager page

- On the left panel, you will see Default Web Site or the Customized Web Site Name that your administrator assigned. Select that item, click Action, and select a new menu item. Select Virtual Directory. The following page will appear:

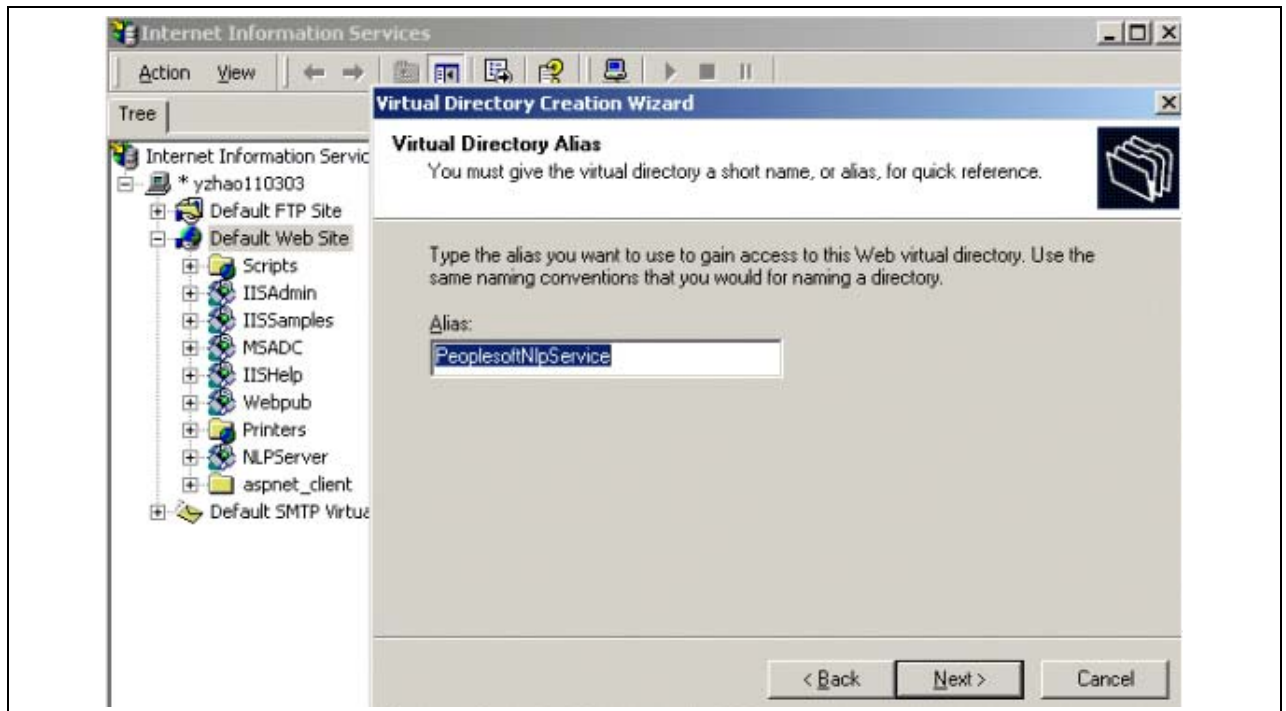


Virtual Directory Creation Wizard - Welcome page

- Specify the unique alias name for your virtual directory. In other words, if you assign PeoplesftWebService as the name, then when you access this virtual web application you will need to

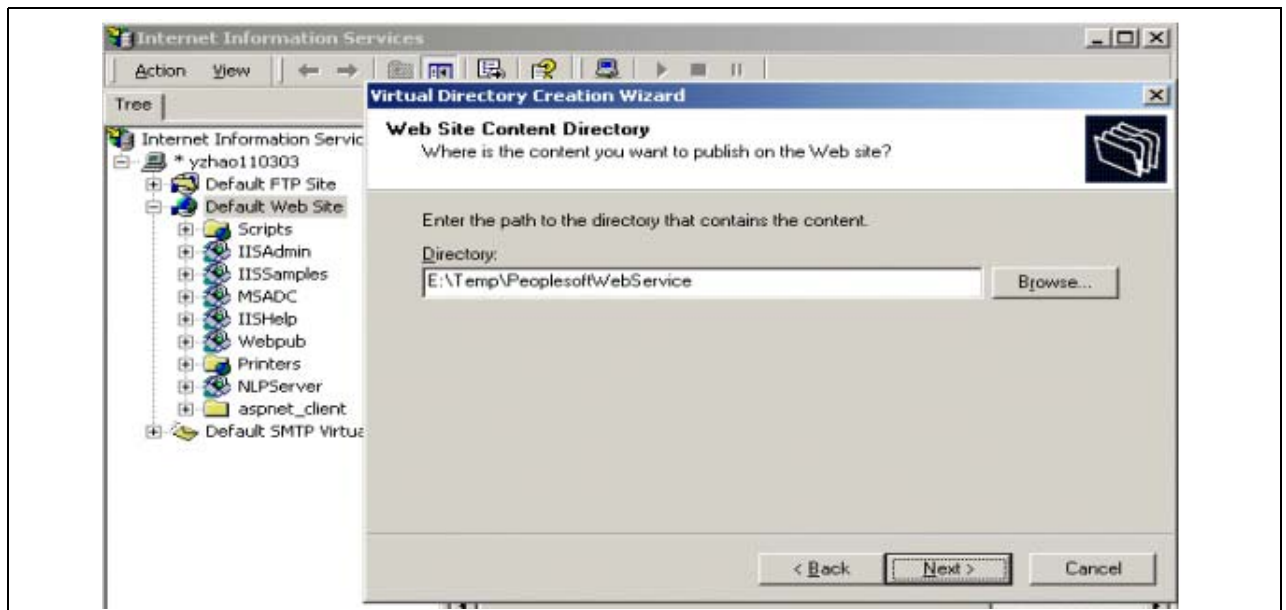


type `http://machinename:port/PeoplesoftWebService/` in the IE browser so that the browser will load the application under that installation directory.



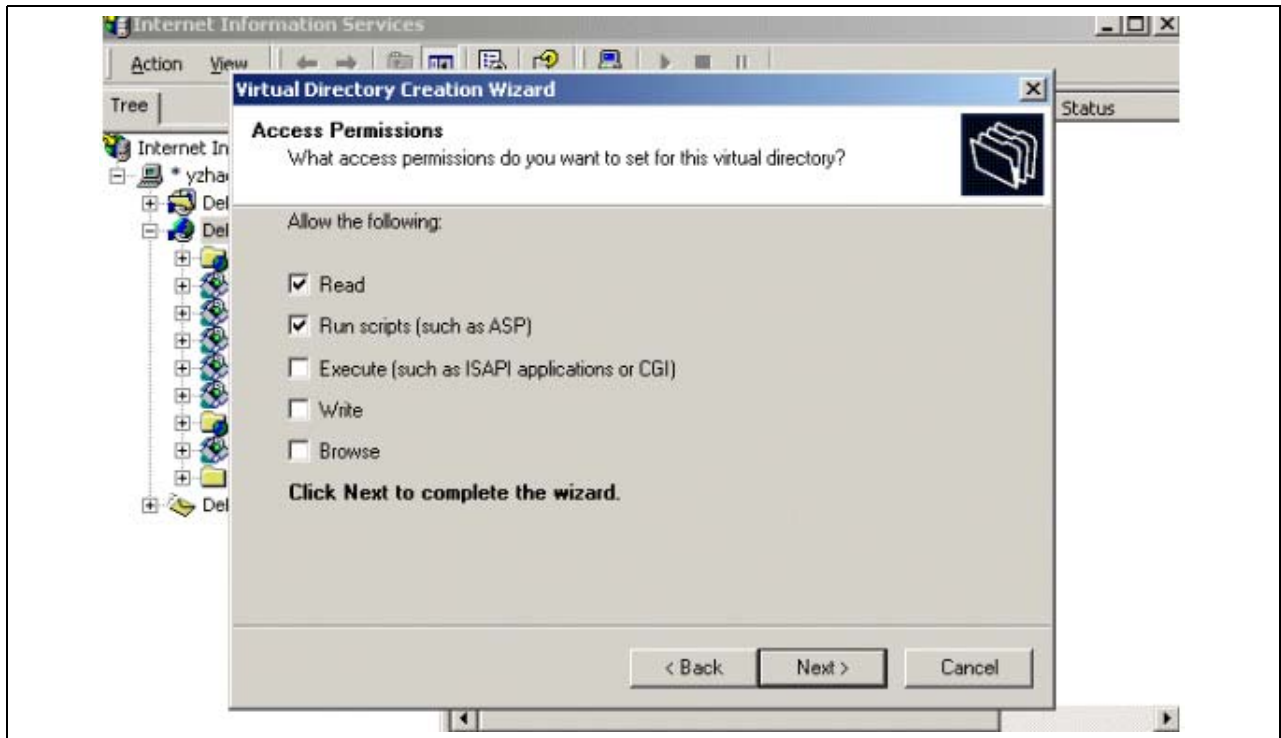
Virtual Directory Alias page

4. Identify the PeopleSoft web service software installation directory where you want to unzip the software:



Web Site Content Directory page

5. Accept the system defaults for the property selections, and complete the website setup:



Access Permissions page

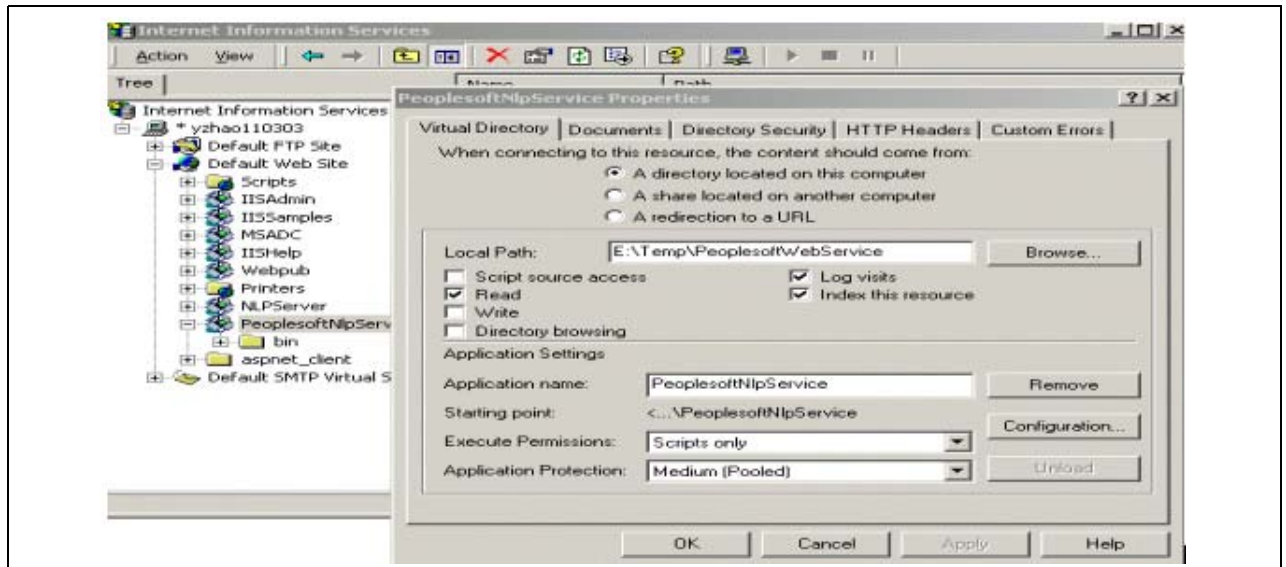
---

## Task 13-3: Validating the .NET Runtime Environment

You need to confirm that the PeopleSoft web service application is associated with the .Net runtime environment on the installation machine.

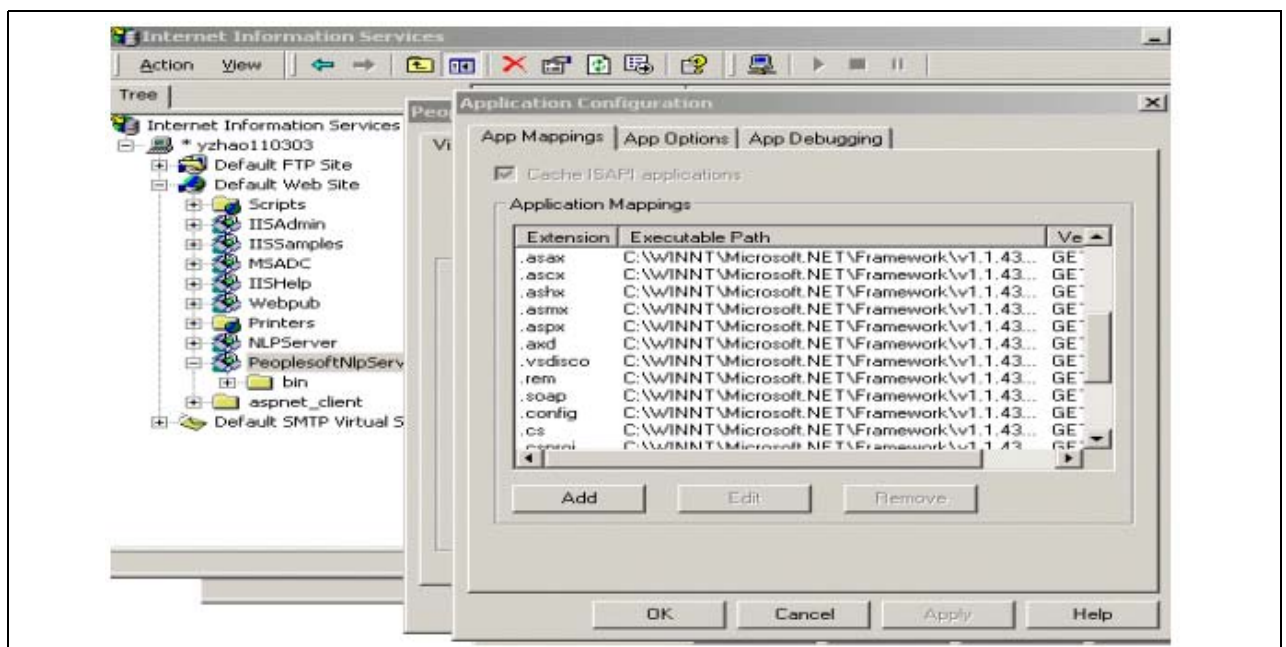
To validate the NET runtime environment:

1. Select the installed website name, click the Properties button or right-click the Properties menu item to view this page:



PeopleSoft NLP Service Properties page

2. Click the Configuration button and verify that the app mappings include the .Net framework-related file extension:



Application Configuration page

3. If you didn't find the app mapping, go to the DOS command and perform these steps:
  - a. Change the current folder to c:\winnt\Microsoft.Net\Framework\v1.1.4322 (the latest release number).
  - b. Type in this command:

Aspnet\_regiis.exe -s W3SVC/1/ROOT/PeoplesoftWebService(your virtual directory name)

The .Net framework app mappings for the given website will install.

---

## Task 13-4: Granting Access to Banter Server

When you install the dot net redistributed package, the local machine account ASPNET is created automatically. That account is used to run any .Net web service application. That account is also used to access the Banter server.

You should group all Banter server users in a designated window group and grant the necessary permission to that group. That grouping eliminates the need to restart the Banter server when adding a new user. If you create a window group, you must add the ASPNET account as the Banter server user. By default, ASPNET belongs to the Users group.

Access the DOS command window, go to the Banter server bin directory, and do one of the following:

- Grant.bat your customize group name
- Grant.bat domainname\ASPNET

The domain name should be the domain name of the local account ASPNET. It should be your local network machine name.

Although you can use the customized account to run the asp net application, we don't explain here how to do that. Go to the Microsoft MSDN website for information.

When you install the Banter server, you are asked to specify under which window account the Banter server service is running. You can change this account by going to the DOS command window, accessing the Banter server bin directory, and issuing the following command:

```
ChangeServerIdentity.bat <domain\user-account> <password>
```

---

**Note.** Reboot the machine after this action.

---

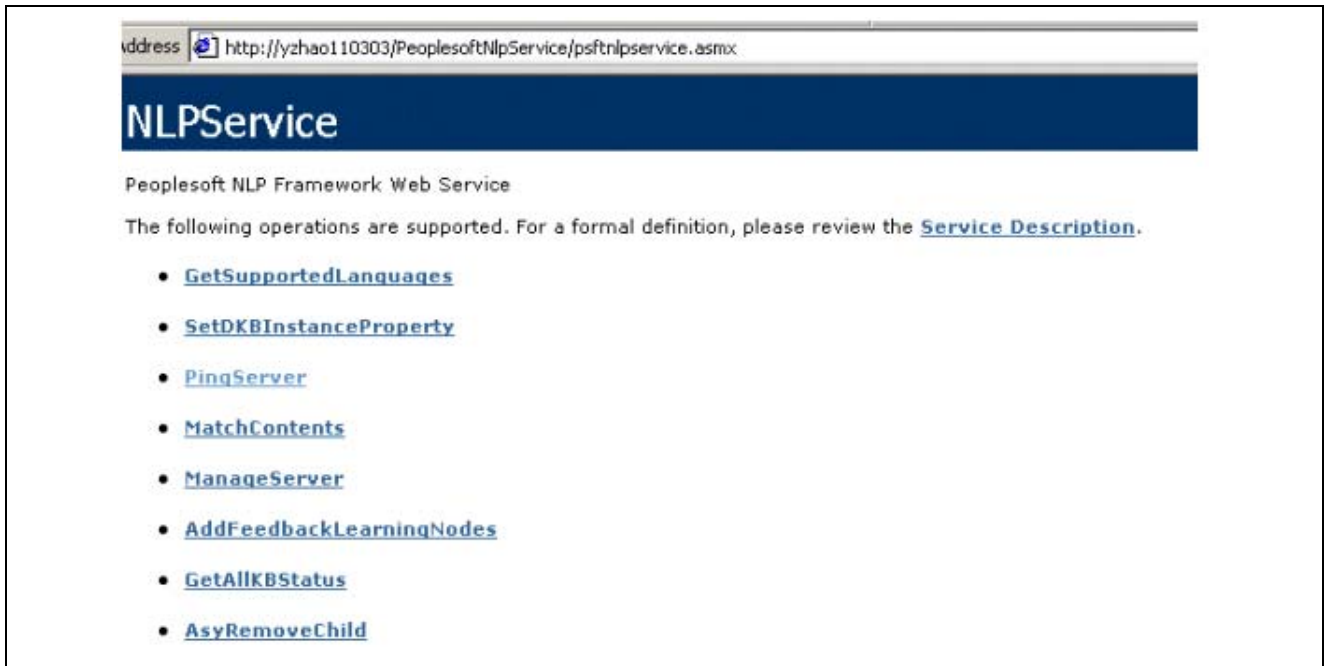
---

## Task 13-5: Test Web Service from Browser

In the address bar, type in the following link:

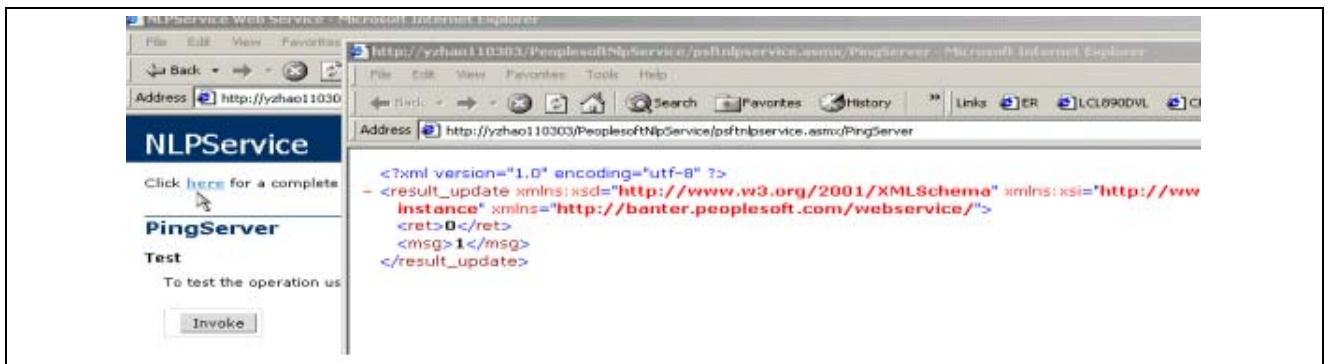
<http://machinename:port/virtualdirectoryname/psftnlpservice.asmx>

You should see this list of web service methods:



NLP Service Methods window

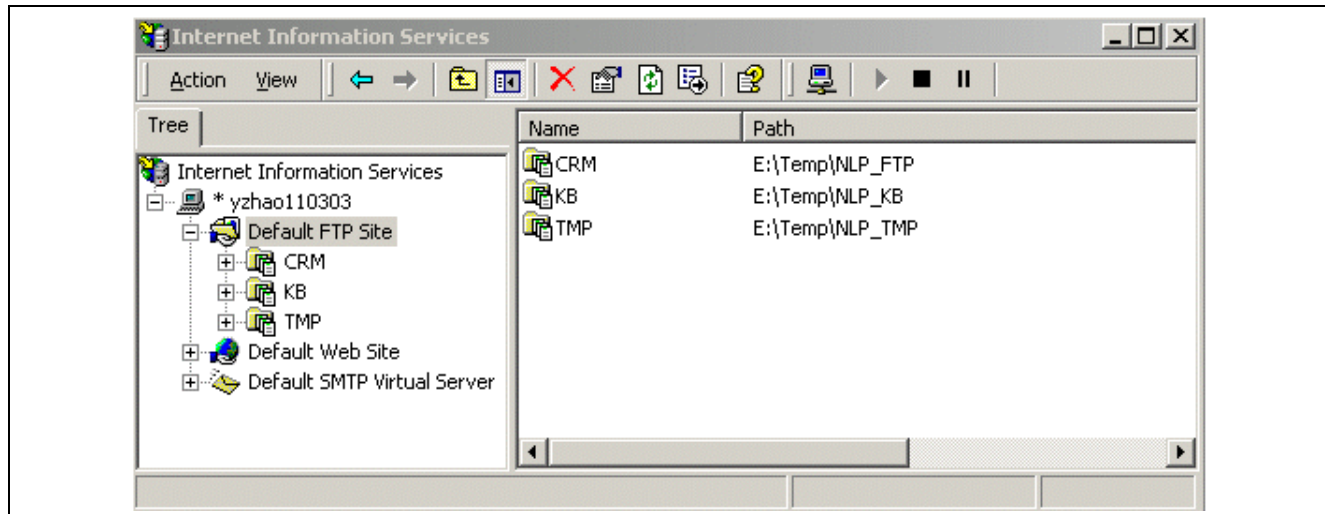
Click the [PingServer](#) link and then click the Invoke button. The following response will appear, indicating that the PeopleSoft web service software can successfully call the Banter server through the internet:



Successful PingServer Response window

## Task 13-6: Setting Up the FTP Site

Set up the FTP site by using Microsoft Internet Service Manager. You should set up the FTP site on the installation machine instead of on the network FTP server. The PeopleSoft application engine program uses this FTP site to temporarily save the Knowledge Base-related data file and once the data files are exhausted; these files are purged by the PeopleSoft application engine program. For example, here is the CRM FTP site we use for the NLP test:



Setting Up the FTP Site page

Once you have installed the FTP site, go to next step.

**Note.** If you have one shared FTP site in your corporate network and you want to use that FTP server, then you must map the network drive on the installation drive. It is your responsibility to define the URL for the FTP site created in this step from the PeopleSoft Portal (PeopleTools > Utility > Administration > URL).

## Task 13-7: Configuring PeopleSoft Web Service Application Environment

Go to the DOS command window and change the directory to the PeopleSoft web service application installation bin directory. The executable file is psconfig.exe. If you need help, type psconfig.exe. It shows you how to use this tool.

```
E:\890\NLP_Framework\NLPService\bin>psconfig
PeopleSoft NLP Web Service Configurator Version 1.0.0.0
Copyright (C) Peoplesoft Inc USA 2003 - 2004. All rights reserved

Peoplesoft Configurator Options

- Input Parameter -
/user:<User ID> User Login Identifier (Short form: /u)
/password:<User Password> User Login Password (Short form: /p)
/authenticated:<1 or 0> 1: require authentication 0: No authentication (Short form: /a)
/wkdir:<folder> NLP Web Service Installation folder (Short form: /w)
/ftpsdir:<folder> Local FTP server installation folder (Short form: /f)
/tmpdir:<folder> Specify the temporary folder (Short form: /t)
/map:<file> load peoplesoft language code mapping file (csv format) and reset languages setting (Short form /m:)

- Miscellaneous -
/help Display the usage message (Short form: /?)
/view Display the peoplesoft web service settings (Short form:/v)

- Usage Examples -
psftconfig /v View the application setting
psftconfig /u:sa /p:sa Change the user id and password

psftconfig /m:c:\temp\lang_map.txt The lang_map.txt layout is similar to the sample listed below.
ENG,English
FRA,French
```

Example of the psconfig.exe file

Configure these parameters:

- AUTHENTICATION

You must assign a value. If you want the web service authenticated, assign a value of 1. Otherwise, assign 0.

- FTPDIR

The file direction can be mapped to the network drive; however, mapping to a local drive is recommended. Therefore, you must install the FTP service on your local machine. Go to the Internet service manager to set up the FTP site. For example, C:\TEMP\CRM\.

- TMPDIR

Configure a temporary directory. For example, c:\temp\.

- WSDIR

Specify the PeopleSoft web service installation directory where you can find the psftnlpservice.asmx file.

- USER

If authentication is required, specify the user ID.

- PASSWORD

If authentication is required, specify the password.

The following tables illustrate parameter configurations for two scenarios—the case when authentication is required and the case when it's not.

- Authentication required:

Parameter	Value
AUTHENTICATION	1
USER	sa_uid
PASSWORD	sa_pwd
FTPDIR	c:\temp\crm\
WSDIR	c:\peoplesoft\nlp\
TMPDIR	c:\temp\

Here is the associated DOS command:

```
Psconfig /a:1 /u:sa_uid /p:sa_pwd /f:c:\temp\crm\ /w:c:\peoplesoft\nlp\ /t:c:\temp\
```

- Authentication not required:

Parameter	Value
AUTHENTICATION	0
USER	(not applicable)
PASSWORD	(not applicable)
FTPDIR	c:\temp\crm\
WSDIR	c:\peoplesoft\nlp\
TMPDIR	c:\temp\

Here is the associated DOS command:

```
Psconfig /a:0 /f:c:\temp\crm\ /w:c:\peoplesoft\nlp\ /t:c:\temp\
```



## CHAPTER 14

# Installing Unified Agent Desktop (UAD) for PeopleSoft Enterprise CRM Applications

This chapter discusses:

- Understanding Unified Agent Desktop
- Applying the Required Tools Upgrade Project
- Configuring the Oracle Proxy-Enabled Application Server
- Validating the Connection to the MultiChannel Framework REN Server
- Configuring a User as a UAD Voice Agent
- Configuring a User as a UAD MCF Agent
- Configuring Agent Presence Codes
- (Optional) Overriding the Presence Text of System-Defined Entries
- Configuring Action Buttons for the UAD Console
- Defining Task Category Codes
- Configuring Status Codes
- Enabling UAD Pagelet for the Home Page (optional)

Universal Agent Desktop requires Multichannel Framework. It is not associated to any specific CRM product, such as Call Center.

---

## Understanding Unified Agent Desktop

This chapter provides instruction for enabling Unified Agent Desktop within Oracle Enterprise CRM applications. The following installation-related tasks need to be performed to leverage the features provided in Unified Agent Desktop, such as enabling an user as a computer telephony integration (CTI) agent to receive a phone call, process customer transaction related with the call, and to make an outbound call. In addition, this feature enables a user to receive other media channel tasks such as agent-to-customer chats, agent-to-agent chats, emails and other generic business tasks.

---

**Note.** The prerequisite for installing Unified Agent Desktop is the MultiChannel Framework. Please see Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Multichannel Framework (MCF) for enabling MCF features for the CRM applications.

---

---

## Task 14-1: Applying the Required Tools Upgrade Project

Unified Agent Desktop is an HTML console embedded within the PeopleSoft component HTML template. Because this is a CRM-specific implementation, the base Tools objects that render the business component HTML template do not contain the layouts necessary to facilitate the Unified Agent Desktop console. For this reason, a special upgrade project must be applied whenever a PeopleTools upgrade is performed. The upgrade project is applied using the PeopleSoft Application Designer.

To apply the Unified Agent Desktop project for Tools upgrade:

1. Open the PeopleSoft Application Designer.

See *Enterprise PeopleTools 8.48 PeopleBook: Getting Started with People Tools* “Understanding Development Tools.”

2. Click the From File option under Tools > Copy Project.
3. Using the directory explorer, find the directory where the CRM\_UAD\_PTUPGRADE project file is located.
4. In the Select Project from the List Below window, click the CRM\_UAD\_PTUPGRADE entry and click the Select button.
5. In the Copy From File window, click the Copy button to copy project file objects into the target database.

---

## Task 14-2: Configuring the Oracle Proxy-Enabled Application Server

If the Oracle proxy setting is enabled on the Application Server where REN server is configured, a fully qualified domain must be specified; otherwise, the connection to the REN server will not be established.

To configure REN server for the Oracle proxy-enabled application server:

1. Navigate to PeopleTools > REN Server Configuration > REN Server Cluster.
2. In the REN Server Cluster URL field, enter the URL in the following syntax format:

```
http://<REN Server machine name>.<domain token name>:<port #>
```

3. Click Save.

---

**Note.** For the non-Oracle proxy-enabled application server, the domain token name is not required.

---

---

## Task 14-3: Validating the Connection to the MultiChannel Framework REN Server

To receive and process tasks such as chats, emails, and generic task, the user session must have established a valid connection to the MultiChannel Framework (MCF) REN server; otherwise, the user will not be able to either receive or send MCF tasks. The connection validation consists of two tests:

- Buffer test
- Ping test

To validate connection to MCF REN server:

1. Using the Administrator login ID and the password, log into the Oracle ECRM session.
2. Navigate to PeopleTools > REN Server Configuration > REN Server Cluster.
3. Search for the current REN Server Cluster and open the definition.
4. Check to make sure that the State flag is set to *Active*.
5. Click the Buffer Test button.

A new pop-up browser window with the page title Buffer Test for REN Server should have been launched with 50,000 bytes successfully processed; otherwise, a problem occurred on the REN server and the issue should be reported to the System Administrator.

6. With the 50,000 bytes correctly processed, the Buffer test is passed. Close the Buffer Test browser window.
7. Click the Ping Test button.

A new pop-up browser window with the page title Ping Test for REN Server should have been launched; otherwise, a problem occurred on the REN server and the issue should be reported to the System Administrator.

8. Click the Run Ping Test button from the new Ping Test window.

Verify that 10 events have been sent and received; otherwise, a problem occurred on the REN server and the issue should be reported to the System Administrator.

## See Also

*Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft MultiChannel Framework*, “Configuring REN Servers ”

## Task 14-4: Configuring a User as a UAD Voice Agent

The same installation steps for configuring a CTI agent apply to configuring a user as a UAD voice agent.

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft MultiChannel Framework* “Configuring PeopleSoft CTI.”

**Note.** The Presence and Reason Code found under Tools configurations are not used by the UAD functionality since UAD manages its agent presence and reason codes.

With UAD enabled, the user is given an extra level of tracing capability via the Application Dispatcher logging mechanism. The Application Dispatcher is a new browser window that remains open throughout the UAD session to handle all events between the agent and the Java Server MultiChannel Application Programming Interface (JSMCAPI). With the new UAD enabled, the current trace level option provides the following debugging capability:

Trace level	Non-UAD CTI Agent	UAD CTI Agent
0 — None	None	None
1 — Info	J	A, J
2 — Debug	J	A, J

A = Apps Dispatcher Trace Browser window

J = JSMCAPI Trace Browser window

As soon as the UAD agent is logged into a PeopleSoft Enterprise CRM session, either the Apps Dispatcher, the JSMCAPI, or both trace browser windows will be automatically launched depending on the type of trace level option configured for the UAD agent.

To configure this option:

1. Navigate to PeopleTools, MultiChannel Framework, CTI configuration, Agent.
2. Select the Trace Level from the drop-down list box.

To configure the Tools-enabled CTI agent as a UAD CTI agent:

1. Navigate to Set Up CRM > Product Related > MultiChannel Definitions > Unified Agent Desktop > Agent Configuration.
2. Enter a valid user ID and click Add a New Value to create a new UAD agent configuration definition.
3. Click the Add button.
4. In the CTI parameters section, enter the agent's default extension number. The system will use the default extension, 1, to automatically establish the connection to the CTI server upon initial agent session login.
  - Extension 1: Enter Agent's default extension number.
  - Extension 2 (if so configured): Enter Agent's second extension number.

---

**Note.** The number of lines and extensions is configured by the Tools setup. Currently, only these two CTI configurations are allowed by Tools: 1 Line/2 Extensions or 2 Lines/1 Extension.

---

- Number of Recently Dialed Numbers to Remember: The system will store and remember the last *N* number of recently dialed numbers for future usage specified in this field. The default is 10 numbers.
5. Configure the following parameters specific to the agent:
    - Warning

Parameter	Description
Minute/Second	The time threshold when the system will warn the UAD agent by displaying a specially rendered time values. No special event is taking place, but the agent will be notified that task processing is taking too long.
Style	PSTIMEWARNING (default)  This value can be customized by the user to use different styles for the warning time.
Display Image	This image will appear to the right of the time value. The default is the exclamation mark in a triangle.

- Expired

Parameter	Description
Minute/Second	The time threshold when the system will warn the UAD agent that the time allowed to process the customer call has exceeded the time limit allowed by the call center.
Style	PSTIMEEXPIRED (default)  This value can be customized by the user to use different styles for the warning time.
Display Image	This image will appear to the right of the time value. The default is the red exclamation mark.

- Click Save to save the UAD agent configuration.

## Task 14-5: Configuring a User as a UAD MCF Agent

The same installation steps for configuring an MCF agent apply to configuring a user as a UAD MCF agent.

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft MultiChannel Framework* “Configuring MCF Agents.”

With the new UAD enabled, the current Trace Level option provides the following debugging capability:

Trace Level	Non-UAD MCF Agent	UAD MCF Agent
0 - None	None	None
1 - Information	J	A, J
2 - Debug	J	A, J

A = Apps Dispatcher Trace Browser window

J = JSMCAPI Trace Browser window

As soon as the UAD agent is logged into an Oracle ECRM session, either the Apps Dispatcher, the JSMCAPI, or both trace browser windows will be launched, depending on the type of Trace Level option configured for the UAD MCF agent.

To configure this option:

- Navigate to PeopleTools > MultiChannel Framework > Universal Queue > Administration > Agents.
- Select the Trace Level from the drop-down list box.

To configure a Tools-enabled MCF agent as a UAD MCF agent:

- Navigate to Set Up CRM > Product Related > MultiChannel Definitions > Unified Agent Desktop > Agent Configuration.
- Enter a valid user ID and click Add a New Value to create a new UAD agent configuration definition.

If the Agent definition already exists, search and open the existing definition; otherwise, click the Add button.

3. In the Default Agent Queue section, enter the agent's default queue to which the agent will be automatically logged in upon initial session login.
4. The same Warning and Expired settings are used for both voice calls and other MCF tasks.

Please refer to the task Configuring a user as an UAD voice agent for instructions on how to configure these parameters.

5. Click Save to save the UAD agent configuration.

## Task 14-6: Configuring Agent Presence Codes

Presence codes are values of text strings that are predefined and used internally by the JSMCAPI framework to determine the state of UAD agents. JSMCAPI, based on the current state of the agent, manages and decides how to best route the MultiChannel tasks to the most appropriate agent to handle the incoming tasks. The presence text will appear on the UAD console with respect to the corresponding Agent state.

In a typical installation, you do not need to configure presence codes for an Agent because the system-defined entries are sufficient for the UAD operations.

To configure Agent presence codes:

1. Navigate to Set Up CRM > Product Related > MultiChannel Definitions > Unified Agent Desktop > Agent Configuration.
2. Click the UAD Presence Codes tab.

The following entries are system-defined defaults that are delivered with the application:

Channel	Presence State	Presence Text	Reason Code
Voice	Not Ready	Not Ready	Unavailable
Voice	Ready	Ready	(not applicable)
Voice	Work Not Ready	Work Not Ready	(not applicable)
Voice	Work Ready	Work Ready	(not applicable)
Multichannel Queue	Available	Available	(not applicable)
Multichannel Queue	Unavailable	Unavailable	(not applicable)
Multichannel Queue	Assumed Unavailable	Assumed Unavailable	(not applicable)

3. To add a system default presence code entry, click the Add System Default button and perform the following tasks:
  - Select a Channel, either Voice or Multichannel Queue.
  - Select a Presence State from the drop-down list box.

- Enter a Presence Text value.

---

**Note.** The Reason Code is used only for the Unavailable or Not Ready Presence state in the Multichannel Queue or Voice channel, respectively.

---

---

## Task 14-7: (Optional) Overriding the Presence Text of System-Defined Entries

The UAD will always use the presence text of the system-defined entries unless they're redefined as the Agent Default.

To override the system-defined entries:

1. Click the Add Agent Default button.
2. Enter the following values:
  - Select a Channel, either Voice or Multichannel Queue.
  - Select a Presence State from the drop-down list box.
  - Enter a Presence Text value.
  - Enter a Reason code if the Presence State selected is either Not Ready for the Voice channel or Unavailable for the Multichannel Queue channel.
3. Click Save to save the UAD Agent Configuration.

---

## Task 14-8: Configuring Action Buttons for the UAD Console

All of the UAD management tasks are performed and managed by a button click or a text short-cut key. The configuration of the UAD console is highly customizable. The look-and-feel of the console can be easily modified to meet the requirement of a user site.

In a typical installation, you do not need to configure action buttons because the system-defined entries are sufficient for the UAD operations.

To configure action buttons for the UAD console:

1. Login to the PeopleSoft Enterprise CRM session as Administrator.
2. Navigate to Set Up CRM > Product Related > MultiChannel Definitions > Unified Agent Desktop > Console Definition.
3. Select a Display option. The default is Image.

---

**Note.** Action buttons on the UAD console can be rendered either as an image or as text. The text option will render all action buttons with the text label; the image option will render the corresponding image icon for each button.

---

4. Click the Add button to add an Action button definition:
  - Button Name: The name of the action button.
  - Call Action: The action executed by clicking the button.

- **Disabled:** If selected, the button is not used.
- **Label:** The text label of the button used when the text display option is chosen.
- **Enabled Button Image:** The name of the button image.

5. Click Save to save the button definition.

**Note.** To support the comprehensive set of existing CTI functionalities, the following button entries are required and delivered as default system data. Removing any of the system default button entries will break the CTI functionality and is not recommended.

System-defined default action buttons:

Button Name	Call Action	Disabled	Label	Enabled Button Image
COMPLETE	Complete	No	CP	PS_UAD_CALL_COMPLETE_ICN
CONFERENCE	Conference	No	CF	PS_UAD_CONFERENCE_ICN
CONSULT	Consult	No	CS	PS_UAD_CONSULT_ICN
CONSULT TRANSFER	Consultative Transfer	No	CT	PS_UAD_CONSULT_TRANSFER_ICN
CTI AVAILABLE	Make CTI Available	No	A	PS_UAD_VOICE_AVAILABLE_ICN
DIAL OUT	Dial Out	No	D	PS_UAD_MAKE_CALL_ICN
HOLD	Hold	No	H	PS_UAD_HOLD_ICN
RECONNECT	Reconnect	No	RC	EOPP_LINK_NODE_ICN
RELEASE	Release	No	X	PS_UAD_RELEASE_ICN
RETRIEVE	Retrieve Hold	No	RH	PS_UAD_RETRIEVE_ICN
TRANSFER	Transfer	No	T	PS_UAD_TRANSFER_ICN



---

## Task 14-9: Defining Task Category Codes

Task category codes are codes that are selected by the task processing UAD agent to categorize MCF tasks at the time of their completion. The following task scenarios will trigger the task categorization required by the UAD agent:

- Terminating a customer voice call (that is, Releasing or Transferring to another internal UAD CTI agent).
- Terminating a customer chat.
- Closing an email.

The list of Task categories will be presented on the UAD console as a drop-down list box of the entries.

To define Category Codes:

1. Login to a PeopleSoft Enterprise CRM session as Administrator.
2. Navigate to Set Up CRM > Product Related > MultiChannel Definitions > Unified Agent Desktop > Console Definition.
3. Click the Category Codes tab.
4. Click the Add Category Code button to add a new category code entry.

<b>Order</b>	Display order of the Category code. The lower number entry will appear first in the drop-down list box.
<b>Code</b>	The Category code used internally by the UAD framework.
<b>Description</b>	The description of the category. The description appears in the category drop-down list box.

5. Click Save to save the category code definition.

---

## Task 14-10: Configuring Status Codes

Status codes are definition entries used in the UAD status pop-up windows to help a UAD agent change his or her state. In conjunction with action buttons defined for the UAD console, they dictate the behavior of how agents receive MCF and CTI tasks. In a typical installation, you do not need to configure status codes because the system-defined entries are sufficient for the UAD operations.

To add a new CTI status code:

1. Login to a PeopleSoft Enterprise CRM session as Administrator.
2. Navigate to Set Up CRM > Product Related > MultiChannel Definitions > Unified Agent Desktop > Console Definition.
3. Click the Status Codes tab.
4. Click the Add CTI Status Code button to add a new status code for the CTI channel.

<b>Order</b>	Display order of the Status code in the Status pop-up window. The lower number entry will appear first in the status window.
<b>Status Label</b>	Text string value of the status, which appears in the status window.

<b>Event</b>	Corresponding event action being executed when the status is selected.
<b>Image Name</b>	Name of the Image icon being rendered.
<b>Image</b>	Preview of the Image icon selected.
<b>Reason Code</b>	Reason code for the Unavailable event status.

5. Click Save to save the new CTI Status code.

To add a new Multichannel Queue Status code:

1. Login to a PeopleSoft Enterprise CRM session as Administrator.
2. Navigate to Set Up CRM > Product Related > MultiChannel Definitions > Unified Agent Desktop > Console Definition.
3. Click the Status Codes tab.
4. Click the Add Multichannel Queue Code button to add a new status code for the MCF channel.

<b>Order</b>	Display order of the Status code in the Status pop-up window. The lower number entry will appear first in the status window.
<b>Status Label</b>	Text string value of the status, which appears in the status window.
<b>Event</b>	Corresponding event action being executed when the status is selected.
<b>Image Name</b>	Name of the Image icon being rendered.
<b>Image</b>	Preview of the Image icon selected.

5. Click Save to save the new Multichannel Queue Status code.

These default CTI Status codes are delivered as system data:

Order	Status Label	Event	Image Name	Reason Code
1	Available	Available	PS_UAD_VOICE_AVAILABLE_ICN	(not applicable)
2	Unavailable	Unavailable	PS_UAD_VOICE_UNAVAILABLE_ICN	Unavailable
3	Do Not Disturb	Do Not Disturb	PS_UAD_VOICE_BUSY_ICN	Do Not Disturb
4	Busy	Busy	PS_UAD_VOICE_BUSY_ICN	Busy
5	At Lunch	At Lunch	PS_UAD_VOICE_UNAVAILABLE_ICN	At Lunch
6	On Break	On Break	PS_UAD_VOICE_UNAVAILABLE_ICN	On Break

Order	Status Label	Event	Image Name	Reason Code
7	Away	Away	PS_UAD_VOICE_UNAVAILABLE_ICN	Away
8	In Wrap-Up Mode	In Wrap-Up Mode	PS_UAD_VOICE_UNAVAILABLE_ICN	In Wrap-Up Mode

These default Multichannel Queue Status codes are delivered as system data:

Order	Status Label	Event	Image Name
1	Available	Available	PS_UAD_MC_AVAILABLE_ICN
2	Unavailable	Unavailable	PS_UAD_MC_UNAVAILABLE_ICN
3	Busy	Busy	PS_UAD_MC_BUSY_ICN
4	At Lunch	At Lunch	PS_UAD_MC_UNAVAILABLE_ICN
5	On Break	On Break	PS_UAD_MC_UNAVAILABLE_ICN
6	Away	Away	PS_UAD_MC_UNAVAILABLE_ICN

## Task 14-11: Enabling UAD Pagelet for the Home Page (optional)

The content on the user's homepage for the Oracle ECRM applications is rendered via pagelets. To allow users to render the UAD console in a pagelet, the agent must enable the Multichannel Toolbar option from the Content Personalization menu.

To enable the UAD Console for the homepage:

1. Login as a UAD agent.
2. Click the Content personalize link.
3. In the CRM pagelet group section, select the Multichannel Toolbar check box.
4. Click the Personalize Layout link next to the Arrange pagelets.
5. In the right column, highlight the Multichannel Toolbar entry by clicking it once.
6. From the arrow buttons above the Delete Pagelet button, click the Up arrow button to move the Multichannel Toolbar entry to the top of the right column entries.

---

**Note.** This step is recommended only when the UAD agent has other main menu pagelets that are too big to allow the UAD console to be seen unless the user scrolls vertically to the bottom of the page to view it.

---

7. Click Save.

## CHAPTER 15

# Installing Operational Dashboards for CRM 9

This chapter discusses:

- Preparing for Dashboard Installation
- Installing Dashboard
- Verifying Installation Directories

Dashboard is a separate module. If customers want to use Dashboard, they must install it.

---

## Preparing for Dashboard Installation

This section discusses:

- Prerequisites
- Reviewing Hardware and Software Requirements
- Reviewing the Installation Procedure
- Using the Installation Worksheet
- Using Additional Information

### Prerequisites

Before you install the Oracle's PeopleSoft Enterprise Operational Dashboards for CRM application, make sure that the installation environment meets these criteria:

- Databases are running on PeopleSoft PeopleTools 8.48 or higher.
- An application server and a web server for the CRM 9 database have been installed and configured.

*See PeopleSoft Enterprise PeopleTools 8.48: Installation for Oracle.*

### Reviewing Hardware and Software Requirements

PeopleSoft Enterprise Operational Dashboards for CRM 9 require no additional hardware or software beyond those specified for Oracle BAM 10g, PeopleTools 8.48, and the installed PeopleSoft Enterprise CRM 9 applications.

#### See Also

*Oracle BAM Installation Guide Release 10g*

*PeopleSoft Enterprise PeopleTools 8.48: Installation for Oracle*

## Reviewing the Installation Procedure

PeopleSoft Enterprise Dashboard 9 installation consists of these general steps:

1. Install Operational Dashboards for CRM 9.
2. Install and configure Oracle BAM for Dashboard.
3. Customize Oracle BAM Enterprise Link.
4. Set Up PeopleSoft PIA for integration with Oracle BAM.
5. Set Up Oracle BAM for integration with PeopleSoft PIA.
6. Set up single signon.
7. Test access to the Dashboard.
8. Share CRM security information with Dashboard.

## Using the Installation Worksheet

Appendix A provides a form for recording the various file paths and URLs specific to the installation of your system. Numerous values are established in early installation tasks that are later required in subsequent setup tasks. By using this record sheet, you can access such values quickly, avoiding errors and saving time as you proceed through the tasks of this installation. In addition, once the system is installed and configured, you can refer to it for maintenance and troubleshooting.

See “Using the System Parameter Worksheet.”

Before you begin installing Dashboards for CRM, look over the Worksheet for the values already established during the installation of PeopleTools.

## Using Additional Information

Appendix B, “Reviewing Install Component Default Locations,” lists the default file locations of Dashboard components. Reference this information whenever you need to find specific files or directories.

Appendix C, “Understanding Architecture and Process Flow,” describes and diagrams how messages flow between the system components. Understanding the basic process flow of the system makes troubleshooting and maintenance planning easier.

---

## Task 15-1: Installing Dashboard

To install Dashboard, complete the following steps, unless they were completed during the installation of the Application CD:

See *PeopleSoft Enterprise PeopleTools 8.48: Installation for Oracle* “Installing the Application CD.”

1. Locate setup.exe on the CD for PeopleSoft Enterprise CRM 9.
2. Double-click the file name to launch the installer.
3. Proceed through the installation dialogs, selecting the required Dashboard options.

---

## Task 15-2: Verifying Installation Directories

To verify that the install process copied all project files, scripts, and DAT files to the installation machine, make sure that these subdirectories are in the installation directory (<PS\_HOME>\setup\rts\_dashboard):

- alert
- dataobject
- ems
- folder
- install
- install\images
- plan
- report
- role
- sampledata
- securityfilter
- user

---

**Note.** Record the value for <PS\_HOME> in the System Parameter Worksheet (Appendix A) for later reference.

---

See “Using the System Parameter Worksheet.”





## CHAPTER 16

# Installing and Configuring Oracle Business Activity Monitoring for Dashboard

This chapter discusses:

- Installing Oracle BAM 10g
- Modifying Web Server Access
- Verifying Oracle BAM Access
- Verifying Oracle BAM Services
- Extending the Maximum Number of Processes

---

### Task 16-1: Installing Oracle BAM 10g

Install Oracle Business Activity Monitoring (BAM), including Enterprise Link and BAM, as described in *Oracle BAM Installation Guide Release 10g*.

To optimize the integration of PeopleSoft CRM and Oracle BAM components, follow these recommendations for:

- Initial tablespace size for database accounts.

Create two database accounts, ORACLEBAM and SAGENT, setting the initial tablespace size of each to 2 GB, with Auto Extents set to *ON*.

- Optional features.

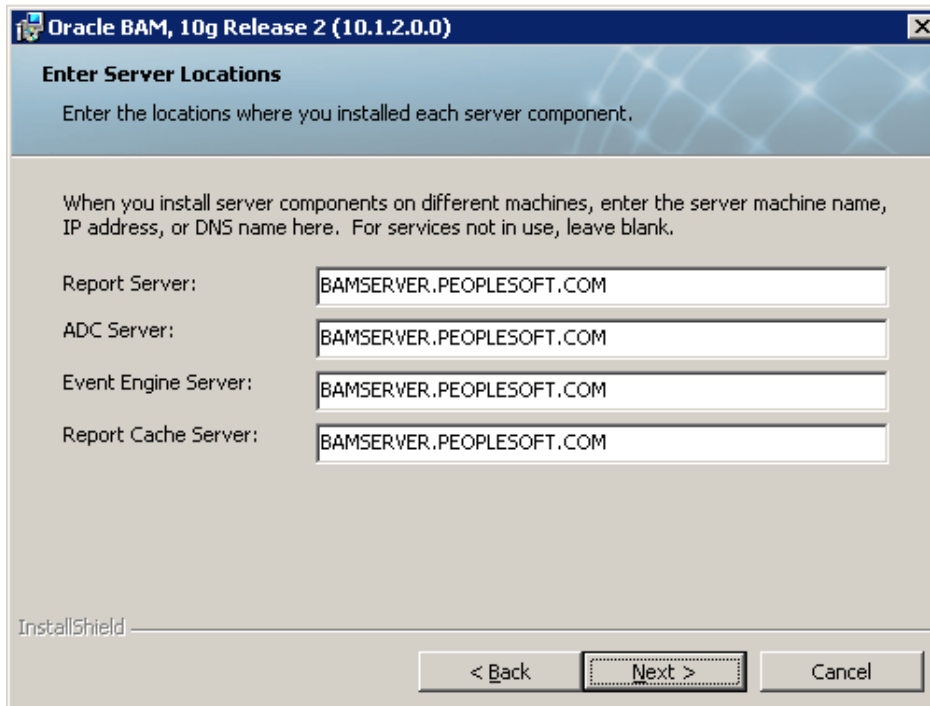
When you install Enterprise Link, accept the default feature selections.

When you install BAM, however, clear the default check boxes for these Oracle BAM components, as they are not required by CRM Dashboard:

- Active Messenger.
- Sample Data Objects.
- ADC Clustering Support (under the Active Data Cache feature).
- Collaboration Service
- Enterprise Link MSMQ WebService.

- Domain names.

If you plan to implement PeopleSoft single signon, all BAM server components must have the same machine domain name. Thus, at the Enter Server Locations dialog box of the BAM installation, enter the machine's domain name for each server, as shown in the following example:



Example of Domain name for Oracle BAM installation

Record the relevant machine name domain names in the Worksheet.

---

**Important!** If the IIS port was changed to a port other than the default (80), you must modify URL-related values in three places to include the port number: 1) the Oracle BAM URL, 2) the web.config file, and 3) the OracleBAMEventEngine.exe.config file.

Locate the web.config file in the Oracle BAM installation directory, and modify the ApplicationHostName value to include the IIS port number (<machine name.domain:IIS Port>).

Repeat this modification in the OracleBAMEventEngine.exe.config file for the WebServerName value.

---

## Task 16-2: Modifying Web Server Access

To modify web server access for Dashboard:

1. Open Internet Information Services (IIS) Manager (Start, Programs, Settings, Control Panel, Administrative Tools).
2. Select the name of the machine that is running the Oracle BAM web server.
3. Select WebSites, Default Web Site, OracleBAM.
4. Right-click and select *Properties*.
5. Access the Directory Security tab.
6. Click the Edit button in the Authentication and access control group box.
7. Clear the Enable anonymous access check box and select the Integrated Windows authentication check box.

8. Return to the folder pane and select *Services* in OracleBAM.
9. Right-click and select *Properties*.
10. Access the Directory Security tab.
11. Click the Edit button in the Authentication and access control group box.
12. Select the Enable anonymous access check box and clear the Integrated Windows authentication check box.

---

## Task 16-3: Verifying Oracle BAM Access

You can check access to the newly installed Oracle BAM by launching the Oracle BAM Start page and viewing the Dashboard data.

To verify Oracle BAM access:

1. In the browser's URL field, enter the BAM web server URL to launch the Oracle BAM Start page:

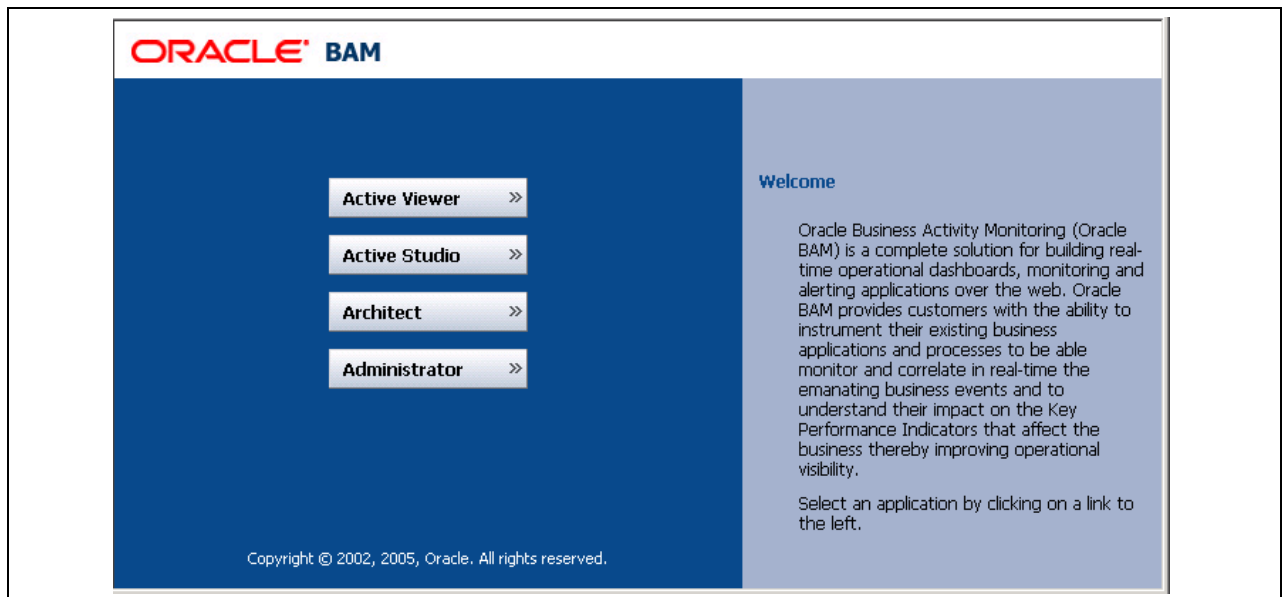
`http://<machine name.domain name>:<port number>/ORACLEBAM/`

For example: `http://bamserver.peoplesoft.com/ORACLEBAM/`

---

**Warning!** BAM web page access is case sensitive. Use the same account that was used during the BAM web server install, observing case.

---



Oracle BAM Start page

2. Click the Architect button.  
Oracle BAM Architect is launched.
3. Return to the Oracle BAM Start page and click the Active Studio button.  
Oracle BAM Active Studio is launched.

---

## Task 16-4: Verifying Oracle BAM Services

Open Windows services (Start, Programs, Settings, Control Panel, Administrative Tools). Verify that the Oracle BAM services that are required for PeopleSoft Enterprise CRM Dashboard are installed. You can disable other Oracle BAM services if they are installed.

CRM Dashboard applications require these services:

- Oracle BAM Active Data Cache
- Oracle BAM Data Flow Service
- Oracle BAM Plan Monitor
- Oracle BAM Report Cache
- Oracle BAM Event Engine

---

**Important!** When you start Oracle BAM services, start them in the order that they appear in the preceding list. Conversely, when you stop the services, stop them in *reverse* of the order shown.

Additionally, start all services above with the network user ID (see the Worksheet).

---

---

## Task 16-5: Extending the Maximum Number of Processes

To set the maximum number of processes allowed by your Oracle database server:

1. Open the `init<instance>.ora` file in the `$ORACLE_HOME/dbs` directory of the database server.
2. Set the `processes` parameter to `150`.
3. Restart the instance of the Oracle database.
4. Restart all Oracle BAM services. Refer to the previous task for the order of restart.

See Verifying Oracle BAM Services.

## CHAPTER 17

# Customizing Oracle BAM Enterprise Link

This chapter discusses:

- Customizing the Oracle BAM Enterprise Link

---

### Task 17-1: Customizing the Oracle BAM Enterprise Link

To customize the Oracle BAM Enterprise link configuration:

1. Launch Oracle BAM Enterprise Link Admin (Start, Programs, Oracle BAM Enterprise Link, Admin).
2. Select the Servers tab.
3. On the Servers tab, click the Register New button.
4. Enter the machine name running the Data Flow Service and click the Register button.
5. Select *Data Flow Service* in the left panel under the newly registered server name.
6. Select the Configuration tab.
7. Enter these parameter values:

Parameter	Value
AgentVMMemory	393216
MaxBlocks	4000
MaxFieldLength	65535
MaxMemoryBlocks	393216
MaxResultBlocks	5000
MaxResults	200
MaxSinkBlocks	5000
MaxUsrMemoryBlocks	393216
MaxUsrThreads	300
MaxUsrToSysLimit	0

8. Stop and then restart both the Plan Monitor Service and the Data Flow Service.

9. From the Oracle BAM Start page, navigate to Architect, Data Objects, System, Plan Monitor.
10. Select an Oracle BAM plan monitor.
11. Select the data object *Journal*.
12. Click the Clear button.
13. Click OK.
14. Click the Continue button.

---

**Note.** If multiple plan monitors reside on different host machines, repeat the steps in this task for each machine that is running a data flow service and plan monitor service. Record the host machines in the Worksheet.

---

## CHAPTER 18

# Setting Up PeopleSoft Pure Internet Architecture for Integration with Oracle BAM

This chapter discusses:

- Setting Up CRM Dashboard Administrator User
- Setting the Authentication Domain
- Enabling Parallel Message Processing
- Setting Up the Process Scheduler
- Creating a JMS Server
- Setting Up a Gateway
- Configuring the PT\_CDB\_WEB\_SERVICE Node
- Setting Up the URL for Oracle BAM Start Page
- Verifying JMS Dependencies

---

### Task 18-1: Setting Up CRM Dashboard Administrator User

This task specifies the steps to create the main CRM Dashboard user. This user enables later Dashboard installation steps (this user will be also installed on the Oracle BAM Dashboard side on the integration).

To set up CRM Dashboard Administrator PTCDBADMIN User:

1. Log on to the PeopleSoft application as VP1.
2. In the PeopleSoft application, navigate to PeopleTools, Security, User Profiles, Copy User Profiles.
3. On the search page, select the existing VP1 user ID.
4. On the page, enter the PTCDBADMIN value into the New User ID, New Password, and Confirm Password fields. Enter the CRM Dashboard Administrator value into the Description field.
5. Click Save.

## Task 18-2: Setting the Authentication Domain

This task specifies the string that completes the domain portion of an HTTP address, for example, .mydomain.com. Setting the authentication domain enables cookie-sharing between the portal and Oracle BAM Active Server and other system web applications. In addition, it is required for the single signon setup (see Chapter 20).

To set the authentication domain:

1. In the PeopleSoft application, navigate to PeopleTools, Web Profile, Web Profile Configuration.
2. In the search page, select the profile that was used during PeopleSoft Pure Internet Architecture setup in the Profile Name field.
3. On the General tab, enter a value in the Authentication Domain field.

Enter the name of the extended authentication domain in which the portal is running, starting with a leading period. This value overrides, but must be compatible with, the base-level authentication domain. For example, if you entered .cusomter.com during the PeopleSoft Pure Internet Architecture setup, only values such as .enterprise.customer.com and .individual.customer.com are valid.

This example shows the General page:

The screenshot shows the 'General' tab of the 'Web Profile Configuration' page. The 'Profile Name' is 'PROD'. The 'Description' is 'Installation Defaults'. The 'Authentication Domain' is '.enterprise.basedomain.com'. There are buttons for 'Save As ...' and 'View History'. Below the text fields are checkboxes for 'Compress Responses', 'Compress Response References', and 'Compress Query', each with a help icon. A 'Compress Mime Types' field contains 'application/x-javascript,text/javascript,text/css,text/html'.

Web Profile Configuration - General page (partial)

4. Click Save and record the value in the Worksheet.
5. Restart the PeopleSoft application server.

### See Also

*Enterprise PeopleTools 8.48 PeopleBook: Internet Technology*, “Configuring the Portal Environment”

## Task 18-3: Enabling Parallel Message Processing

Perform this step only if you want to use multiple daemon processes to manage the message change queue. Skip this task and proceed to the next if you intend to use a single process scheduler for managing processes.

Parallel processing is recommended because of its significant performance benefits. However, it is not mandatory. Refer to the *PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook* for a discussion of the benefits of parallel processing.



To enable parallel message processing:

1. Create a new Daemon Group definition:
  - a. Navigate to PeopleTools, Process Scheduler, Daemon Group.
  - b. Access the Add a New Value page, enter a new name, and click the Add button.  
The Daemon Group page appears.
  - c. Click the Lookup icon for the Program Name field and select *PT\_CDB\_PMSG*.
  - d. Click the Save button.

2. Create a new Server definition:
  - a. Navigate to PeopleTools, Process Scheduler, Servers.
  - b. Access the Add a New Value page, enter a new name, and click the Add button .  
The Server Definition page appears.
  - c. In the Process Types run on this server grid, enter these values and click Save:

Field	Value
Process Type	<i>Application Engine</i>
Priority	<i>Medium</i>
Max. Concurrent	<i>2</i>

- d. Access the Daemon page.
  - e. Select the Daemon Enabled check box.
  - f. In the Daemon Group field, select the daemon group you created in the previous step.
  - g. In the Daemon Sleep Time field, enter *1*.
  - h. Click the Save button.
3. Run `psadmin.exe` to set up a Process Scheduler for the server that you created. In the configuration menu that appears, use the new server's Server Name value for item 12 - Server Name.
4. Modify and run the `dash_change_appserver_cdb.dms` data mover script.
  - a. Open the script in Data Mover.
  - b. Change the ServerName string to the name of the process scheduler server that you created in the previous step.
  - c. Change the value of the Application Code to the Installed Dashboard Product Code of the Dashboard that will be processed by this server. Codes are provided in the following table and in the Worksheet:

Dashboard Product	Code
Common Dashboard	<i>RBD</i>
Sales Dashboard	<i>SLD</i>
Order Capture Dashboard	<i>OCD</i>
Contact Center Dashboard	<i>SDB</i>

---

**Note.** A single process scheduler server can have multiple application codes associated with it. However, an application code is assigned to only one server.

---

- d. Run the script.
- 5. Repeat steps 2 to 4 for each process scheduler in the system.

---

**Note.** Each Dashboard requires at least one process scheduler dedicated to its common-object and application-specific processing needs. However, performance is optimal with at least two process schedulers per Dashboard—one for the common objects and one for the application-specific objects. Some Dashboards may need more than two for optimal processing.

---

For example, if you are installing the Sales Dashboard, you will need two different process schedulers to enable parallel processing. However, if you decide to run the process schedulers on one server, assign the application code to a valid server name by repeating step 4.

- 6. Navigate to Set Up CRM, Product Related, Dashboard, Installation Options.
- 7. Select the Parallel Processing Enabled check box and click Save.

---

**Note.** As delivered, the system suppresses dashboard messaging during the Sequential Initial Data load. Running the `dash_allow_messaging_cdb.dms` script overrides this setting, causing significant performance degradation. You should use the delivered configuration and not run this script. Refer to *PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook* for a discussion of suppressing messaging during batch data loads. However, if you want to override the default behavior, you can run the script via the Data Mover after you trigger the sequential Initial Data Load.

---

## Task 18-4: Setting Up the Process Scheduler

This task configures the PSCDB process scheduler, which watches the message queue for Dashboard message requests initiated by the PeopleSoft application. When a new request appears in the queue, it processes the request and sends the message to the JMS server.

---

**Important!** Perform this task *only* if you have not enabled parallel processing.

---

To set up the PSCDB process scheduler:

- 1. Create a new Daemon Group definition:
  - a. Navigate to PeopleTools, Process Scheduler, Daemon Group.
  - b. Access the Add a New Value page, enter a new name, and click the Add button.  
The Daemon Group page appears.
  - c. Click the Lookup icon for the Program Name field and select `PT_CDB_UPDAT`.
  - d. Click the Save button.
- 2. Select and run `<PS_HOME>\appserver\psadmin.exe`, accepting the default values and modifying only these values:

Master Schdlr: *No*

PrsServer: *PSCDB*

UserId and UserPwd: *PTCDBADMIN* and the corresponding password

See *Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration*, “Using PSADMIN Menus.”

---

**Note.** If the Process Scheduler Server Configuration with the default database name was already created, create another Process Scheduler Server Configuration with a different name and update DBNAME with the actual database name.

---

3. Access the process scheduler configuration file and uncomment the JavaVM Options parameter by removing the semicolon.
4. Set the value of the JavaVM Options parameter to `-Xrs`.
5. Set up the process scheduler as a service, and start the service.

See *Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration*, “Using PSADMIN Menus, Using PSADMIN Menus, Configuring the PeopleSoft Service.”

6. Verify that the process scheduler is available in the Process Monitor in PeopleSoft Pure Internet Architecture.
7. Attach the daemon group PTCDBMSG to the process scheduler PSCDB:
  - a. Navigate to PeopleTools, Process Scheduler, Servers.
  - b. Open the PSCDB server.
  - c. Access the Daemon page and make sure that the Daemon Enabled check box is selected.
8. Restart the PSCDB process scheduler service that you created previously.

See *Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration*, “Using PSADMIN Menus, Using PSADMIN Menus, Configuring the PeopleSoft Service.”

---

## Task 18-5: Creating a JMS Server

You can create a JMS server in one of two ways:

- Manually entering parameters and performing the setup.
- Using the delivered template (for WebLogic only).

---

**Note.** The delivered template creates a JMS server on a WebLogic web server.

---



---

**Important!** Loading the template overrides any existing JMS server configuration, creating a new instance of the JMS server on the WebLogic server.

---

To create a JMS server manually, enter these values using the JMS management utility of the web server:

1. Enter these settings for the Connection Factory - PSFT DSH JMS Connection Factory:

Parameters	Values
JNDI Name	<code>psft.dsh.jms.connection.factory</code>
Delivery Mode	<code>Persistent</code>

Parameters	Values
Default Time To Live	172,800,000 ms (48 hours) (suggested)
Messages Maximum	4,000 (suggested)
Overrun	Keep Newest (suggested)

2. Enter these settings for the Topic - PSFT DSH Update Topic:

Parameters	Values
JNDI Name	psft.dsh.jms.topic.update
Template	PSFT DSH Topic Template (suggested)

3. Enter these settings for the Topic - PSFT DSH Raw Update Topic:

Parameters	Values
JNDI Name	psft.dsh.jms.topic.updateraw
Template	PSFT DSH Topic Template (suggested)

4. Enter these settings for the Template - PSFT DSH Topic Template:

Parameters	Values
Maximum Message Size	500,000 (suggested) <b>Note.</b> For better performance, use a file-based message store (if possible).

To create a new JMS server using the delivered template (WebLogic users only):

1. Install WebLogic if it is not already installed.
2. Copy the template jar file, PSJMSServer.jar, from the Dashboard CD folder \<PS home>\setup\rts\_dashboard\install locally to the \BEA\weblogic81\common\templates\domains folder.
3. Stop the WebLogic service if it has been started.
4. Launch the Configuration Wizard (Start, Programs, BEA WebLogic Platform 8.1).
5. Select the Create a new WebLogic configuration button and click the Next button.
6. In the Local Additional Templates drop-down list box in the next dialog pane, browse to select the local directory containing PSJMSServer.jar. Click OK.
7. In the Templates drop-down list box, select *PeopleSoft Dashboard JMS Server* from the folder named Other and click the Next button.
8. Continue through the remaining dialogs to complete the install. You might change the Configuration Name; otherwise, accept the default, which is *peoplesoft1*.

The install process creates the directory `..\user_projects\domains\` with the specified Configuration Name under the WebLogic configuration.

---

**Note.** The default port number is 8000.

---

9. Start the JMS server by launching `c:\bea\user_projects\domain\<configuration name>\startJMS.cmd`.

---

**Note.** Make sure that required environment variables are set by editing and launching `c:\bea\user_projects\domain\<configuration name>\setEnv.cmd`.

---

## Task 18-6: Setting Up a Gateway

To set up a gateway:

1. Navigate to PeopleTools, Integration Broker, Configuration, Gateways.
2. Open the *LOCAL* gateway.
3. In the URL field, enter `http://<PIA web server>:<port>/PSIGW/PeopleSoftListeningConnector`.
4. Click the Load Gateway Connectors button.
5. When the system has loaded the connectors, click Save.
6. Click the Ping Gateway button.

A confirmation message appears if communication was successful.

7. If you want to use a JNDI factory location other than the delivered default value, you must add a Connector property to the gateway to override the default.

Defaults are:

<b>WebLogic</b>	<code>weblogic.jndi.WLInitialContextFactory</code>
<b>MQSeries</b>	<code>com.ibm.websphere.naming.WsnInitialContextFactory</code>
<b>IPlanet</b>	<code>com.sun.jndi.fscontext.ReffFSContextFactory</code>
<b>Oracle</b>	<code>com.evermind.server.rmi.RMIInitialContextFactory</code>

To add a JMSJNDIFactory Connector property:

- a. Return to the Gateways page.
- b. Click the Properties link of the JMSTARGET connector.  
The Gateways: Connector Properties page for that connector appears.
- c. Add a new row at the desired position in the grid.
- d. Enter these values and save the changes:

Property	Value
Property ID	<i>JMSTARGET</i>
Property Name	<i>JMSJNDIFactory</i>
Required	Cleared
Value	no value
Default	Cleared

8. Click the Gateway Setup Properties link.

9. On the login page, enter the user ID *administrator* and the password *password*.

The PeopleSoft Node Configuration page for the default gateway application server appears.

10. Verify and, if necessary, update the values in the Gateway Default App. Server group box.

For example:

Field	Example Value
Web Server URL //<machine name.domain name>:<jolt port>	//applicationwebserver.peoplesoft.com:9000
User ID	VP1
Password	VP1
Tools Release	8.48

11. Verify and, if necessary, update the values in the Gateway Default PeopleSoft Nodes grid.

After saving, click the Ping Node button and verify that a success message appears.

For example:

Field	Example Value
Message Node Name	PSFT_CR
Web Server URL	//applicationwebserver.peoplesoft.com:9000
User ID	VP1
Password	VP1
Tools Release	8.48

12. Navigate to PeopleTools, Integration Broker, Integration Setup, Nodes.

13. Open the node definition PT\_CDB\_UPDATE.

14. Access the Connectors page.

15. Select the Gateway ID of the gateway you have set up.

16. Change the *JMSTARGET* Property ID and *JMSUrl* Property Name to the value of the IP address or machine name of the machine that hosts the JMS server and its port number (see the Worksheet). The default port number is 8000.

For example, t3://<JMS SERVER NAME>:8000

17. If you added the Gateway Connector property JMSJNDIFactory, enter the desired Java class name in the Value column of JMSFactory.

18. Save the changes.

19. Navigate to Set Up CRM, Product Related, Dashboard, Installation Options and click the Ping button to verify connection.

20. Make the vendor-specific JMS client messaging driver accessible to the PeopleSoft application servers and process schedulers.

Do this either by copying the jar files into the <PS\_HOME>/class directories or by setting the java classpath in the configuration files of the PeopleSoft application server and process scheduler.

The driver (usually a jar file such as weblogic.jar) allows the JMS Sender to communicate with the JMS server. The actual driver class varies by JMS vendor. Currently, JMS server vendors such as WebLogic and WebSphere are supported.

---

**Note.** If any classes are missing, you will likely get class not found errors at runtime or when pinging the node through the Dashboard Installation page. If so, verify that com.peoplesoft.crm.cdb.jar is in the <PS\_HOME>/class where the application server resides.

---

You should check any jar files needed to support JMS connectivity to ensure that they do not have classes bundled in them that may conflict with classes that the application server would otherwise pick up from its <PS\_HOME>/class directory. If conflicts exist, then both of the jar files should be manually added to the classpath in the application server configuration file in the appropriate order.

For example, suppose you need j2ee.jar for your JMS connectivity. These files contain classes that conflict with the mail.jar file that PeopleSoft Enterprise PeopleTools delivers. To avoid the conflict, you would explicitly add those two jar files to the classpath in the application server (and process scheduler, if appropriate) configuration file, putting mail.jar before j2ee.jar so that the classes in mail.jar are guaranteed to load before any like-named classes in j2ee.jar.

21. Stop and then restart the application server.

### See Also

*Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*, “Using Listening Connectors and Target Connectors”

---

## Task 18-7: Configuring the PT\_CDB\_WEB\_SERVICE Node

This task specifies the parameters needed by the PeopleSoft Integration Broker to process the messaging sent from Dashboard.

To configure the PT\_CDB\_WEB\_SERVICE node:

1. Navigate to PeopleTools, Integration Broker, Integration Setup, Nodes and open the node definition PT\_CDB\_WEB\_SERVICE.
2. Access the Connectors page.
3. Change the value of the *PRIMARYURL* Property ID to the URL that provides the ICommand web service.  
For example: `http://<machine name>.<domain name>:<port number>/ORACLEBAM/Services/ICommand.asmx?DbName=<dbname>`
4. Click Save, and then click the Ping Node button and verify that a success message appeared.

---

## Task 18-8: Setting Up the URL for Oracle BAM Start Page

This task specifies the URL for the navigation link in the left-hand navigation of PeopleSoft applications that launches Oracle BAM Active Studio.

To set up Oracle BAM Start page:

1. Navigate to PeopleTools, Utilities, Administration, URLs.
2. Select the URL identifier named PT\_CDB\_WEB\_URI.
3. Replace it with the machine name (including domain name and port name) of the machine that hosts the Oracle BAM environment. (See the Worksheet for the recorded value.)

For example: `http://<machine name>.<domain name>:<port number> /ORACLEBAM/`

---

## Task 18-9: Verifying JMS Dependencies

To verify JMS dependencies:

1. Launch the Oracle BAM Start page from the browser's URL, entering the BAM web server URL (recorded on the Worksheet or `http://<machine name>.<domain name>/ORACLEBAM/`).

For example: `http://corpservers.peoplesoft.com/ORACLEBAM/`

2. Click the Administrator button.

Oracle BAM Administrator appears.

3. In the drop-down list box, select *Manage Enterprise Message Source Types*.

4. Click the link for the system's JMS server.

The JMS server can vary depending on the server vendor. If the server is running on WebLogic, the link will be *BEA WebLogic Server*. The Enterprise Message Source Type definition appears.

5. Click the Edit link.

The Enterprise Message Source Type definition is now editable.

6. In the Startup parameters field, search for the name of the JMS jar file (for example, `weblogic.jar`) in the paths listed.

7. Modify the path to the system's JMS jar path.

For example: `c:\bea\weblogic81\server\lib\weblogic.jar`

8. Click the Update button, and then click Continue.

---

**Note.** If multiple plan monitors are located on different host machines, make sure that the jar file appears on the specified path of each machine.

---



## CHAPTER 19

# Setting Up Oracle BAM for Integration with PeopleSoft PIA

This chapter discusses:

- Loading Dashboard Objects
- Configuring the PeopleSoft Content Reference for My Dashboard
- Setting the PIA Server URI in Oracle BAM
- Setting the PeopleSoft Web Service Argument

This chapter describes how to specify the various URLs and paths for the connections between the Oracle BAM server and its database and the PeopleSoft application.

---

## Task 19-1: Loading Dashboard Objects

This task installs plans into the repository as well as Dashboard objects such as dataobjects and reports into the Oracle BAM Active Data Cache. The machine running this installation must have the directory c:\temp. All log files in this task are written into c:\temp\dash\_install.

---

**Note.** See detailed information about loading Dashboard objects in `install_instructions.txt`.

---

To load Dashboard objects:

1. Shut down Oracle BAM Event Engine service.
2. Open a DOS command window.
3. Change directories to the install folder <PS\_HOME>\setup\rts\_dashboard\install.
4. Copy the folder <PS\_HOME>\setup\rts\_dashboard\install\images into the Oracle BAM install folder (default location c:\OracleBAM\BAM).
5. Do one of the following:
  - a. If you are using WebLogic JMS server, type the command

```
install -install [-silent] JNDI_URL [DASH_DOMAIN]
```

Provide value for DASH\_DOMAIN as the machine name or IP address in which the Oracle BAM Active Data Cache service was previously installed; if omitted, the default is `localhost`.

Default value for JNDI\_URL is `t3://JMS SERVER NAME :8000`. For this parameter, specify the location of the JMS Server. For example: `install -install t3://JMS SERVER NAME:8000`

The command variables have these meanings:

<b>JNDI_URL</b>	JNDI URL for JMS messaging (no default)
<b>DASH_DOMAIN</b>	the Dashboard domain to use to import (default is localhost).

---

**Note.** The same install command can be used for adding PTCDBADMIN user and updating EMSs.

install [-silent] -AddPTCDBAdmin [*DASH\_DOMAIN*]

install [-silent] -EMSUpdate *JNDI\_URL* [*DASH\_DOMAIN JMS\_TOPIC JMS\_TYPE CTX\_FACTORY JMS\_CONN\_FACTORY*]

---

- b. If you are using another JMS server, type the following command, making sure that you provide the parameters indicated:

```
install [-silent] -install JNDI_URL) [DASH_DOMAIN JMS_TOPIC JMS_TYPE CTX_⇒  
FACTORY JMS_CONN_FACTORY]
```

The command variables have these meanings:

<b>JMS_TOPIC</b>	default is <code>psft.dsh.jms.topic.update</code>
<b>JMS_TYPE</b>	the type of JMS in use (default is <code>EMST.WEBLOGIC</code> ).  This information specifies the jar file that is required in the chapter “Installing and Configuring Oracle Business Activity Monitoring for Dashboard.”
<b>CTX_FACTORY</b>	the name of the Context Factory to use for JNDI (default is <code>weblogic.jndi.WLInitialContextFactory</code> ).
<b>JMS_CONN_FACTORY</b>	the JMS Connection Factory as registered in JNDI (default is <code>psft.dsh.jms.connection.factory</code> )

6. Run `install_samples` to install the sample data:

```
install_samples [DASH_DOMAIN]
```

---

**Note.** Adjust the sample data in the target objects that were imported with the sample data install.

---

7. Install data security filters *only* if business unit row-level security is to be implemented in the PeopleSoft application. Use this command:

```
install_busecurity [DASH_DOMAIN]
```

8. Reboot all servers and restart all Oracle BAM services.

---

## Task 19-2: Configuring the PeopleSoft Content Reference for My Dashboard

This task specifies the location of the My Dashboard report for access from PeopleSoft CRM applications.

To configure the PeopleSoft content reference:

1. Log on to the Oracle BAM Start Page using the URL for the BAM web server.

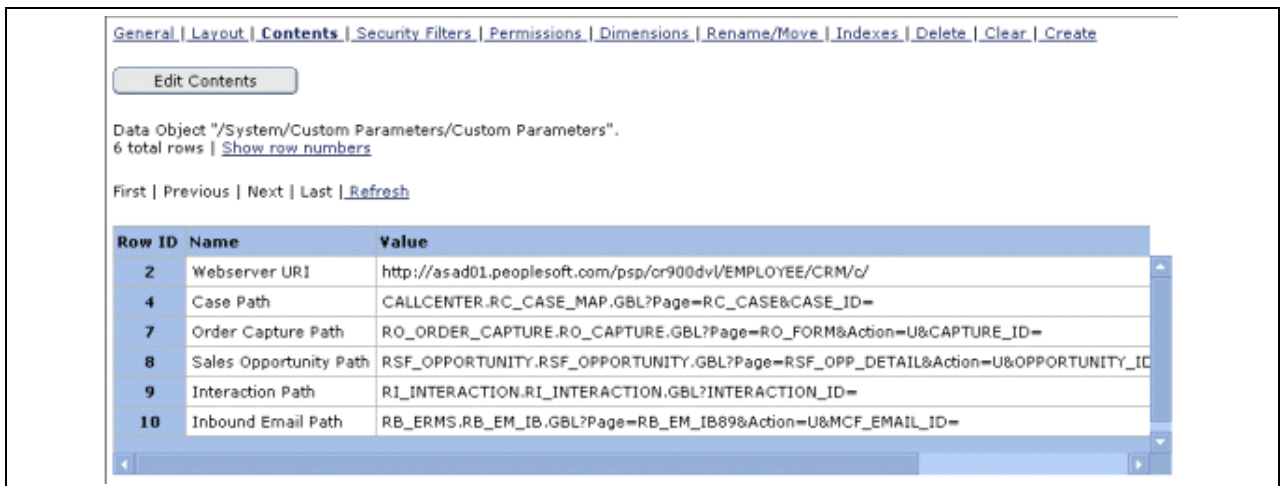
2. Click the Active Studio button.
3. Select the Shared Reports tab.  
A list of shared reports in that folder appears.
4. Select the Dashboard report.
5. Click the Copy Shortcut link in the Actions box.
6. Copy the ReportDef value in the Copy Shortcut – Web Page Dialog window.
7. In the PeopleSoft application, navigate to PeopleTools, Portal, Structure and Contents.
8. Locate My Dashboard Content Reference and click the Edit link.
9. In the Additional Parameters box, replace the value for ReportID with the ReportDef value obtained from the Dashboard report shortcut.
10. Click Save.

## Task 19-3: Setting the PIA Server URI in Oracle BAM

This task specifies the location of the PeopleSoft application server so that users can access PeopleSoft application pages from a Dashboard report.

To set up the PIA server Uniform Resource Index (URI) in Oracle BAM:

1. Return to the Oracle BAM Start Page.
2. Select *Architect*.
3. Select *Data Objects* from the drop down list.
4. Select the System/Custom Parameters folder.
5. Click the Custom Parameters link.
6. In the right-side frame, click the Contents link.



The screenshot shows the 'Contents' page in Oracle BAM. At the top, there are navigation tabs: General, Layout, Contents (selected), Security Filters, Permissions, Dimensions, Rename/Move, Indexes, Delete, Clear, and Create. Below the tabs is an 'Edit Contents' button. The main content area displays the following information:

- Data Object: "/System/Custom Parameters/Custom Parameters".
- 6 total rows | [Show row numbers](#)
- First | Previous | Next | Last | [Refresh](#)

Below this information is a table with the following data:

Row ID	Name	Value
2	Webserver URI	http://asad01.peoplesoft.com/psp/cr900dv/EMPLOYEE/CRM/c/
4	Case Path	CALLCENTER.RC_CASE_MAP.GBL?Page=RC_CASE&CASE_ID=
7	Order Capture Path	RO_ORDER_CAPTURE.RO_CAPTURE.GBL?Page=RO_FORM&Action=U&CAPTURE_ID=
8	Sales Opportunity Path	RSF_OPPORTUNITY.RSF_OPPORTUNITY.GBL?Page=RSF_OPP_DETAIL&Action=U&OPPORTUNITY_ID=
9	Interaction Path	RI_INTERACTION.RI_INTERACTION.GBL?INTERACTION_ID=
10	Inbound Email Path	RB_ERMS.RB_EM_IB.GBL?Page=RB_EM_IB89&Action=U&MCF_EMAIL_ID=

Contents page

7. Click the Edit Contents button.
8. For the Webserver URI parameter, click the Edit link located to the far right of the row.

9. Enter the value of the PIA URI and record it in the Worksheet.

You can obtain the URL by accessing the PeopleSoft application and selecting the URL up to, but not including, the value of the page navigation. An example is the italicized portion of the URL:  
*http://corpserver.peoplesoft.com/pxp/CRM/s/WEBLIB\_PTPP\_SC.HOMEPAGE.FieldFormula.IScript\_AppHP?pt\_fname=CR\_RBD\_COMMON&FolderPath=PORTAL\_ROOT\_OBJECT.CR\_SETUP\_CRM.CR\_PRODUCT\_RELATED.CR\_RBD\_COMMON&IsFolder=true*

10. Click the Update link at the right side of the row.

---

## Task 19-4: Setting the PeopleSoft Web Service Argument

This task requires the substitution of system node information into the Call PeopleSoft Web Service Argument. It has three basic steps:

- Obtain the URL of the web server's gateway listening connector from the PeopleSoft application.
- Obtain the name of the default local integration node of the PeopleSoft application.
- Copy the information above into the web service argument using Oracle BAM Architect.

To set up the PeopleSoft Web Service Argument:

1. Obtain the URL of the gateway listening connector:
  - a. Log in to the PeopleSoft application and navigate to PeopleTools, Integration Broker, Configuration, Gateways.
  - b. Open the LOCAL gateway and copy its URL.  
 Example: `http://corpserver.peoplesoft.com/PSIGW/PeopleSoftListeningConnector`
  - c. Paste the URL to a temporary text file and change "PeopleSoftListeningConnector" to "HttpListeningConnector."  
 Record it in the Worksheet.  
 Example: `http://corpserver.peoplesoft.com/PSIGW/httpListeningConnector`
2. Obtain the name of the default local node:
  - a. Navigate to PeopleTools, Integration Broker, Integration Setup, Nodes.
  - b. Find the node in which the value for Local Node is *I* and the value for Default Local Node is *Y*.
  - c. Record its name on the Worksheet.  
 Example: `PSFT_CR`
3. Log on to Oracle BAM Start Page using the URL for the BAM web server.
4. Select Architect.
5. Select *Data Objects* from the drop down list.
6. Select the System/Alerts folder.
7. Click the External Actions link.
8. In the right-side frame, click the Contents link.
9. Click the Edit Contents button.

10. Locate the parameter for Call PeopleSoft Web Service from the Argument column by clicking the Edit link located to the far right of the row.

Example of parameter:

URL=@@PEOPLESOFT\_GATEWAY@@,SOAPAction=http://peoplesoft.com/PT\_CDB\_ACTION\_MSG/PT\_CDB\_WEB\_SERVICE//@@PEOPLESOFT\_LOCAL\_NODE@@

11. Replace @@PEOPLESOFT\_GATEWAY@@ with the modified URL from step 1.
12. Replace @@PEOPLESOFT\_LOCAL\_NODE@@ with the name of the default local node from step 2.
13. Click the Update button.

Example argument: URL=http://corpserver.peoplesoft.com/PSIGW/httpListeningConnector,SOAPAction=http://peoplesoft.com/PT\_CDB\_ACTION\_MSG/PT\_CDB\_WEB\_SERVICE//PSFT\_CR



## CHAPTER 20

# Setting Up Single Signon for Dashboard

This chapter discusses:

- Understanding PeopleSoft Single Signon
- Enabling PeopleSoft Groups Getter
- Enabling PeopleSoft Single Signon
- Redirecting Assembly Versions
- Modifying Web Server Access

---

## Understanding PeopleSoft Single Signon

Single signon enables users, after being authenticated by a PeopleSoft application server, to navigate across PeopleSoft applications, accessing multiple application servers and databases without again entering a user ID or password.

After the first application server or node authenticates a user, the system creates a web browser cookie containing an authentication token unique to the user's session. Each server that is accessed thereafter in the session uses the cookie to automatically reauthenticate the user.

---

## Task 20-1: Enabling PeopleSoft Groups Getter

To enable PeopleSoft Groups Getter:

1. Edit the OracleBAMActiveDataCache.exe.config file located on the Oracle BAM server machine. The default location is C:\OracleBAM\BAM\ . Add the following lines of code before `</appSettings>`.

**Important!** Do not copy the lines from this document to use in implementation. The code reproduced below is for reference only. For a copy-and-paste version of these code lines, use the text in the file SingleSignon.txt, provided in the PS\_HOME directory (for example, c:\pt8.48\setup\rts\_dashboard\install).

```
<!--This setting enables the Peoplesoft specific GroupsGetter based on =>
/System/Security/User Group dataobject.-->
<add key="ADCGroupsGetterType" value="Oracle.BAM.Common.Security.Groups.Custom=>
=>
GroupsGetter, Oracle.BAM.Common.Core"/>
<add key="CustomAuthenticationAssembly" value="PeopleSoft.BAM.Custom.Groups=>
Getter"/>
```

```
<add key="CustomGroupsGetterType" value="PeopleSoft.BAM.Custom.CustomGroups⇒
Getter" />
```

2. Copy PeopleSoft.BAM.Custom.GroupsGetter.dll from the PeopleTools installation (located in <PS\_HOME>\setup\Dashboard\) into the C:\OracleBAM\BAM and C:\OracleBAM\BAM\bin directories.
3. Check the version of PeopleSoft.BAM.Custom.GroupGetter.dll by right-clicking the file name and selecting Properties and the Version tab. Record the version number on the Worksheet.
4. Restart all Oracle BAM services.

---

**Note.** The PeopleSoft.BAM.Custom.GroupsGetter.dll requires that all Oracle BAM services be started using the network user ID that is the super user in the Active Data Cache (ADC). This network user ID was used to install the system.

---

## Task 20-2: Enabling PeopleSoft Single Signon

To enable PeopleSoft single signon:

1. Open web.config, which is located on the Oracle BAM Start Page application machine.
2. Set enableSessionState to *false*:

```
<pages validateRequest="false" enableSessionState = "false"/>
```

3. Add the following lines of code after <add key="LogToEventLog" value="false"/>:

---

**Important!** Do not copy the lines from this document to use in implementation. The code reproduced below is for reference only. For a copy-and-paste version of these code lines, use the text in the file SingleSignon.txt, provided in the PS\_HOME directory (for example, c:\pt8.48\setup\rts\_dashboard\install).

---

```
<add key="AuthenticationModule" value="Oracle.BAM.Common.Security.Authenticati⇒
⇒
on.CustomAuthenticationModule, Oracle.BAM.Common.Core"/>
<add key="CustomAuthenticationAssembly" value="Peoplesoft.BAM.Custom.SignOn"/>
<add key="CustomAuthenticationTicketType" value="PeopleSoft.BAM.Custom.Custom⇒
AuthenticationTicket"/>
<add key="CustomAuthenticationPriority" value="WARN"/>
<!-- This is the name of the cookie you want to use: -->
<add key="CustomTokenName" value="PS_TOKEN"/>
<add key="Credentials" value="Oracle.BAM.Common.Security.Authentication.Custom⇒
⇒
TokenCredentials, Oracle.BAM.Common.Core"/>
<add key="ADCPrincipalType" value="Oracle.BAM.Common.Security.Custom.Custom⇒
Principal, Oracle.BAM.Common.Core"/>
<add key="ADCIdentityType" value="Oracle.BAM.Common.Security.Custom.Custom⇒
Identity, Oracle.BAM.Common.Core"/>
<!-- The following settings will be used to connect to the PS Web Server: -->
<add key="PSWebServer" value="http://web service machine with domain name and⇒
port/PSIGW/HttpListeningConnector"/>
<add key="PSSOAPAction" value="http://peoplesoft.com/PT_CDB_SECURITY/PT_CDB_⇒
WEB_SERVICE//Default Local Node"/>
```



---

**Important!** Be sure to insert actual install system information in place of the text for *webservice machine with domain name and port number* (for example, `http://corpserver.peoplesoft.com/PSIGW/HttpListeningConnector`) and *Default Local Node* (for example, `value="http://peoplesoft.com/PT_CDB_SECURITY/PT_CDB_WEB_SERVICE//PSFT_CR"/`) in the last two lines. See “Setting Up Oracle BAM for Integration with PeopleSoft PIA,” Setting the PeopleSoft Web Service Argument.

---

4. Copy `Peoplesoft.BAM.Custom.SignOn.dll` into the directories `C:\OracleBAM\BAM` and `C:\OracleBAM\BAM\bin` from provided in the `PS_HOME` directory (for example, `c:\pt8.48\setup\rts_dashboard\install`).
5. Check the version of `Peoplesoft.BAM.Custom.SignOn.dll` by right-clicking the file name and selecting Properties and the Version tab. Record the version number on the Worksheet.

---

## Task 20-3: Redirecting Assembly Versions

It is possible that the `Peoplesoft.BAM.Custom.GroupsGetter.dll` and the `Peoplesoft.BAM.Custom.SignOn.dll` versions are different from the installed Oracle BAM.

---

**Note.** To check the version of the installed Oracle BAM, right-click `Oracle.BAM.Common.Core.dll` in the Oracle BAM install directory (default location `c:\OracleBAM\BAM`) and select Properties and the Version tab.

---

If the versions are different, you must modify `OracleBAMActiveDataCache.exe.config` and `web.config`. If the versions are the same, skip this task.

To redirect assembly versions:

1. Open `OracleBAMActiveDataCache.exe.config` in the Oracle BAM install directory and locate:

```
<system.runtime.remoting>
<customErrors mode="off" />
</system.runtime.remoting>
```

2. Following these lines, add the following lines of code, replacing "new version number" with the version of the installed `Oracle.BAM.Common.Core.dll` (for example, 3.4.4923.0). Replace "old version number" with the `Peoplesoft.BAM.Custom.GroupsGetter.dll` (for example, 3.4.4812.0).

---

**Important!** Do not copy the lines from this document to use in implementation. The code reproduced below is for reference only. For a copy-and-paste version of these code lines, use the text in the file `SingleSignon.txt`, provided in the `PS_HOME` directory.

---

```
<runtime>
<assemblyBinding xmlns="urn:schemas-microsoft-com:asm.v1">
<dependentAssembly>
<assemblyIdentity name="Oracle.BAM.Common.Core" publicKeyToken="public token=>
value" culture="neutral" />
<!-- Assembly versions can be redirected in application, publisher policy, or=>
machine configuration files. -->
<bindingRedirect newVersion="new version number" oldVersion="old version=>
number" />
```

```

</dependentAssembly>
<dependentAssembly>
  <assemblyIdentity name="Oracle.BAM.ADC.Common" publicKeyToken="public token=>
key" culture="neutral" />
  <!-- Assembly versions can be redirected in application, publisher policy, or=>
machine configuration files. -->
  <bindingRedirect newVersion="new version number" oldVersion="old version=>
number"/>
</dependentAssembly>
<dependentAssembly>
  <assemblyIdentity name="Oracle.BAM.ADC.Api" publicKeyToken="public token key"=>
culture="neutral" />
  <!-- Assembly versions can be redirected in application, publisher policy, or=>
machine configuration files. -->
  <bindingRedirect newVersion="new version number" oldVersion="old version=>
number"/>
</dependentAssembly>
</assemblyBinding>
</runtime>

```

3. Add the following lines of code to the web.config file in the Oracle BAM install directory before the line </configuration>.

---

**Note.** In this step, replace "old version number" with the version number of PeopleSoft.BAM.Custom.SignOn.dll (for example, 3.4.4812.0). Replace "new version number" with the version of the installed Oracle.BAM.Common.Core.dll, as in step 2.

---

```

<runtime>
<assemblyBinding xmlns="urn:schemas-microsoft-com:asm.v1">
  <dependentAssembly>
    <assemblyIdentity name="Oracle.BAM.Common.Core" publicKeyToken=>
"acdd5a747bafala8" culture="neutral" />
    <!-- Assembly versions can be redirected in application, publisher policy, or=>
machine configuration files. -->
    <bindingRedirect newVersion="new version number" oldVersion="old version=>
number"/>
  </dependentAssembly>
</assemblyBinding>
</runtime>

```

4. Restart all Oracle BAM services.
5. Restart server processes:
  - a. Open IIS in the Microsoft Management Console (usually Start, Administrative Tools ...).
  - b. Right-click IIS Admin Service and select Restart.

---

## Task 20-4: Modifying Web Server Access

To modify web server access for Dashboard:

1. Open Internet Information Services (IIS) Manager (Start, Settings, Control Panel, Administrative Tools).
2. Select the name of the machine that is running the Oracle BAM web server.
3. Select WebSites, Default Web Site, OracleBAM.
4. Right-click and select *Properties*.
5. Access the Directory Security tab.
6. Click the Edit button in the Authentication and access control group box.
7. Select the check box for Enable anonymous access and clear the check box for Integrated Windows authentication. If the inheritance override message appears, do not select a value, and click OK.
8. Restart server processes:
  - a. Open IIS in the Microsoft Management Console (usually Start, Administrative Tools...).
  - b. Right-click the IIS Admin Service and select Restart.



# CHAPTER 21

## Testing Access to the Dashboard

This chapter discusses:

- Verifying Single Signon
- Verifying Access to Active Studio
- Verifying Access to Administrator
- Verifying Access to Architect
- Verifying Access to Report Viewer
- Verifying Access to My Dashboard

---

### Task 21-1: Verifying Single Signon

To verify that PeopleSoft single signon is properly configured, log on to the PeopleSoft CRM and perform the following steps. If single signon is properly set up, the system launches Dashboard applications.

Recheck single signon setup if an error occurs.

---

**Note.** Make sure that the browser's pop-up windows are not blocked.

---

---

### Task 21-2: Verifying Access to Active Studio

To verify access to Active Studio:

1. Log on to the PeopleSoft application as PTCDBADMIN.
2. Navigate to Set Up CRM, Product Related, Dashboard, Active Studio.  
Oracle BAM Active Studio is launched in a new window.
3. Look for “Welcome CRM Dashboard Administrator” at the top of the welcome page.  
The name “Dashboard Administrator” is the display name of the login.
4. Select the Shared Reports tab.
5. On the Shared Reports page, select the Dashboard report. (Disregard Dashboard Prompts by closing a dialog window.)  
The Dashboard report appears.
6. Click the Edit link.  
The report becomes editable:



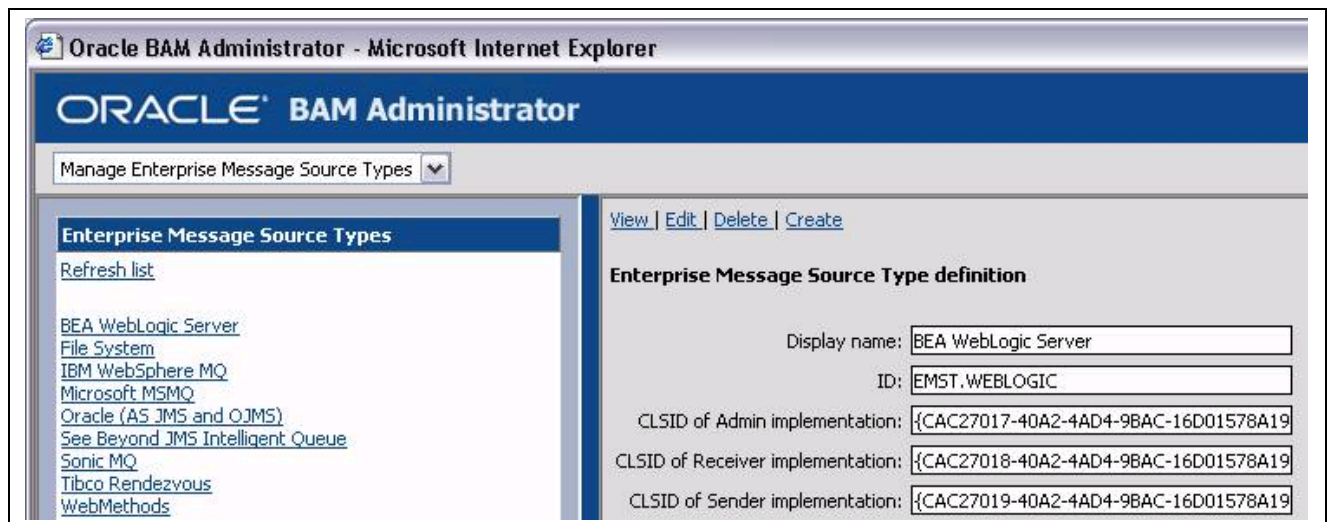
Oracle BAM Active Studio - Home page

## Task 21-3: Verifying Access to Administrator

To verify access to Oracle BAM Administrator from the PeopleSoft application:

1. Log on to the PeopleSoft application as PTCDBADMIN.
2. Navigate to Set Up CRM, Product Related, Dashboard, Administrator.  
Oracle BAM Administrator is launched in a new window.
3. Select *Manage Enterprise Message Source Types* from the drop-down list box of the Administrator page.  
The left panel displays a list of system components that send message sources.
4. Click the BEA WebLogic Server link.  
The server's Enterprise Message Source Type definition appears.
5. Click the Edit link.

The type definition becomes editable:

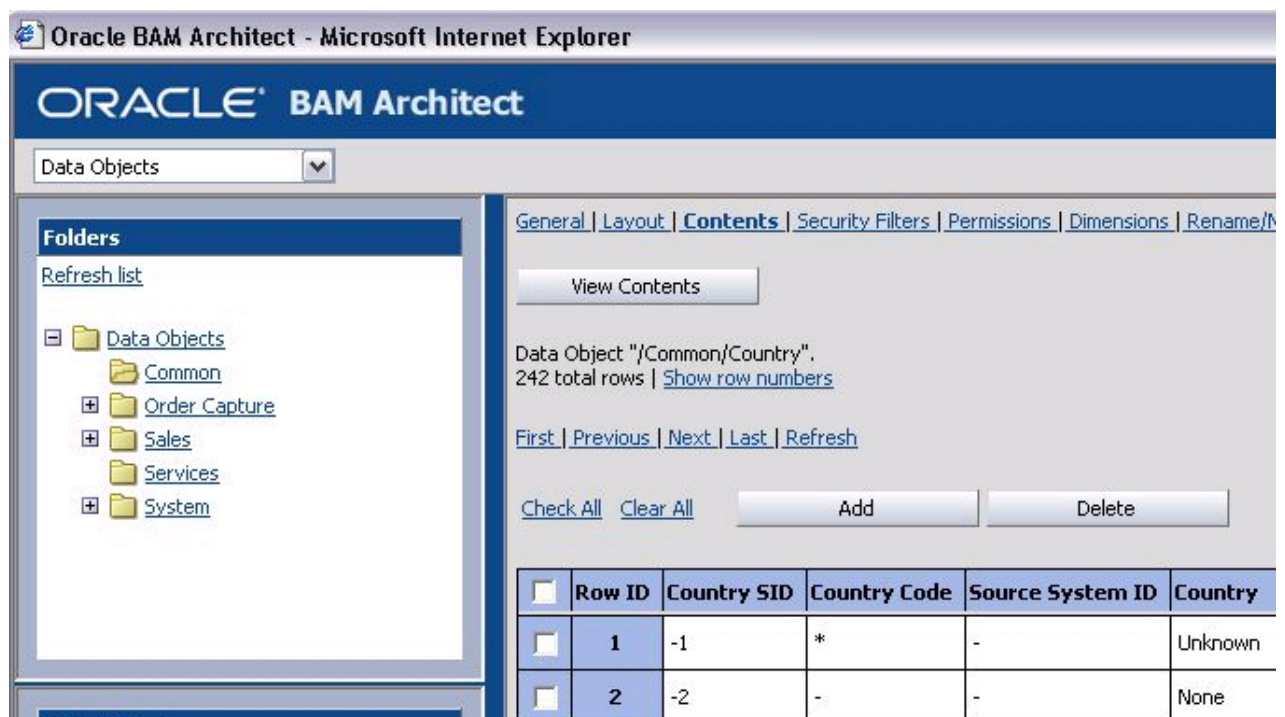


Oracle BAM Administrator - Manage Enterprise Message Source Types page

## Task 21-4: Verifying Access to Architect

To verify access to Architect from the PeopleSoft application:

1. Log on to the PeopleSoft application as PTCDBADMIN.
2. Navigate to Set Up CRM, Product Related, Dashboard, Architect.  
Oracle BAM Architect is launched in a new window.
3. Select *Data Objects* from the drop-down list box of the Architect page.  
A list of data object folders appears in the left panel.
4. Click the Common folder.  
Data objects in the folder are listed below the folder box.
5. Click the *Country* data object.  
Details of the /Common/Country data object appear in the right panel.
6. Click the Layout link at the top of the right panel.  
The data object's field layout appears.
7. Click the Edit Layout button.  
The fields become editable.
8. Close any dialog box that appears for selection.



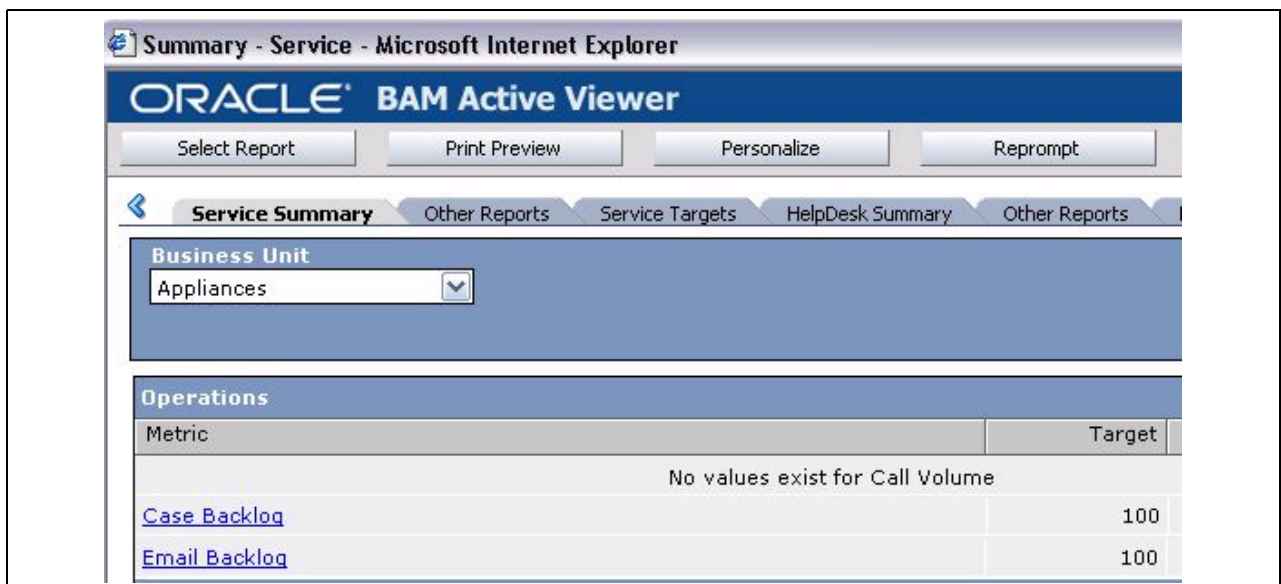
Oracle BAM Architect - Data Objects page

## Task 21-5: Verifying Access to Report Viewer

To verify access to Report Viewer from the PeopleSoft application:

1. Log on to the PeopleSoft application as PTCDBADMIN.
2. Navigate to Set Up CRM, Product Related, Dashboard, Report Viewer.  
Report Viewer is launched in a new window.
3. Click the Select Report button.
4. Select *Shared Reports* from the drop-down list box in the Select a Report - Web Page Dialog window.
5. Select the Dashboard report and click OK. (Disregard Dashboard Prompts by closing a dialog window.)

The Dashboard report appears:



Oracle BAM Active Viewer - Service Summary page

## Task 21-6: Verifying Access to My Dashboard

To verify access to My Dashboard from the PeopleSoft application:

1. Set up a content reference for My Dashboard as described in task 19-2, Configuring the PeopleSoft Content Reference for My Dashboard, Setting Up Oracle BAM for Integration with PeopleSoft PIA.
2. If you are not already logged on, log on to the PeopleSoft application as PTCDBADMIN.
3. In the left-hand navigation, click My Dashboard.  
Oracle BAM Active Viewer appears.
4. Close any dialog box that appears for selection.

The Dashboard report appears. See the previous task for an example of what the system displays.



## CHAPTER 22

# Troubleshooting Dashboard

## Troubleshooting

Use the information in this chapter if you have problems with the Dashboard installation.

This table presents common problems and their solutions:

Problem	Solution
<p>Server Error in '/' Application.</p> <p>Configuration Error</p> <p>Description: An error occurred during the processing of a configuration file required to service this request. Please review the specific error details below and modify your configuration file appropriately.</p> <p>Parser Error Message: It is an error to use a section registered as allowDefinition='MachineToApplication' beyond application level.</p> <p>This error can be caused by a virtual directory not being configured as an application in IIS.</p>	<ol style="list-style-type: none"><li>1. Launch IIS Manager.</li><li>2. Browse to the OracleBAM website.</li><li>3. Right-click OracleBAM and select Properties to access the properties for this site.</li><li>4. Access the Virtual Directory page.</li><li>5. Click the Create button in the Application Settings section.</li><li>6. Click OK.</li></ol>
<p>Cannot start Oracle BAM Enterprise Link Data Flow Service. Error message is: The Oracle BAM Data Flow Service service terminated with service-specific error 126 (0x7E). For more information, see Help and Support Center at <a href="http://go.microsoft.com/fwlink/events.asp">http://go.microsoft.com/fwlink/events.asp</a>.</p>	<ol style="list-style-type: none"><li>1. Navigate to Start, Settings, Control Panel, Administrative Tools, Component Services, Computers, My Computer, DCOM Configuration, PeopleSoft Enterprise Link Data Flow Service Properties.</li><li>2. Select the Security tab and set all permissions to <i>Use Default</i>.</li><li>3. Restart the service.</li></ol> <p>If you can't restart, change all permissions to <i>Customize</i>. Click Edit and your account. Restart the service.</p>
<p>When running plans with the Run Forever check box selected on the EMS, the message is received but no data is written to the data object.</p>	<p>On the DFS machine, create a DWORD registry setting called AllowRegisterWithSplitters under the key /HKEY_LOCAL_MACHINE/Software/Sagent/DataMart/DC/ and set its value to 0. Restart the Data Flow Service and Plan Monitor after the change.</p>

Problem	Solution
When trying to view a report, the browser hangs, displaying "Opening..." in the status box.	<p>Install MSXML 3.0:</p> <ol style="list-style-type: none"> <li>1. Download the file in this folder to your c:\temp:  <a href="http://www.microsoft.com/downloads/details.aspx?FamilyID=c0f86022-2d4c-4162-8fb8-66bfc12f32b0&amp;displaylang=en">http://www.microsoft.com/downloads/details.aspx?FamilyID=c0f86022-2d4c-4162-8fb8-66bfc12f32b0&amp;displaylang=en</a></li> <li>2. Launch the install by double-clicking the file in Microsoft Windows Explorer. Accept all of the defaults in the Install Wizard.</li> </ol>
Data Flow Service hangs.	On the DFS machine, create a DWORD registry setting called AllowRegisterWithSplitters under the key /HKEY_LOCAL_MACHINE/Software/Sagent/DataMart/DC/ and set its value to 0. Restart the Data Flow Service.
<p>Error while running the plan:</p> <p>MessageSourceReceiverImpl.HandleError-&gt;IMessageSourceReceiverOpen:          javax.na. Cannot instantiate class:          weblogicjndi.WLInitialContextFactory [Root          exception is java.lang.ClassNotFoundException:          weblogicjndi.WLInitialContextFactory]</p>	In Oracle BAM Administrator, select the Manage Enterprise Message Source Types link. Select <i>BEA WebLogic Server</i> . Verify that the value that appears in the Startup Parameters drop-down list box contains the correct path for Weblogic.jar. Restart Oracle BAM services.
What is the correct directory setting for IIS?	<p>To enable the PIA gateway to access Default Web Site/ORACLEBAM/Services/Icommand.asmx, enable Anonymous Access for Default Web Site/ORACLEBAM/Services.</p> <p>Also, remove Anonymous Access for Default Web Site/ORACLEBAM.</p> <p><b>Note.</b> These settings are valid only if single signon is <i>not</i> implemented in the system.</p>
When a dimension table is cleared in Dashboard, it clears the rows with -1 and -2 values as well, which won't be reloaded by a bulk load.	<p>Restore the -1 and -2 rows by reimporting the data object:</p> <ol style="list-style-type: none"> <li>1. Locate the xml file in the dashboard install directory &lt;PS home&gt;\setup\rts_dashboard\install\dataobject. For example, dataobject.Common.Country.xml.</li> <li>2. Copy the xml file into a temporary directory, such as c:\temp.</li> <li>3. Shut down the Oracle BAM Event Engine.</li> <li>4. Open a DOS command window.</li> <li>5. Install the data object using ICommand. For example, ICommand cmd=import file="c:\temp\dataobject.Common.Country.xml" updatelayout="1" domain=&lt;machine name hosting the ADC service&gt; logfile="c:\temp\dataobject.Common.Country.log".</li> <li>6. Restart all Oracle BAM services.</li> </ol>

## APPENDIX A

# Using the Dashboard System Parameter Worksheet

Use this worksheet to record system specifics for installation configuration tasks. When a task instructs you to record system values, record them here. Other tasks refer you to the values that you record here.

Parameter Name and Description	Where obtained	Task where needed	System Value	Example
Network user ID used to install Oracle BAM	NA	Throughout, for BAM services restart	(Case-sensitive)	PEOPLESOFT\AppInstaller
PS_HOME\	Task 16–2	Throughout		C:\<PS_HOME>\
weblogic.jar path	Oracle BAM installation	Task 19–5 Task 19–8		\bea\weblogic81\server\lib \weblogic.jar
Machine name of the Data Flow Service host	Oracle BAM installation	Task 18–1		dfshost.peoplesoft.com
Host machine(s) for plan monitor(s)	Oracle BAM installation	Task 18–1		pmhost.peoplesoft.com
PeopleSoft application machine domain name		Task 17–1		.peoplesoft.com <b>Note.</b> Include the initial period.

Parameter Name and Description	Where obtained	Task where needed	System Value	Example
URL of the machine that hosts the Oracle BAM environment.  http://<machine name>.<domain name>:<port number>/ORACLEBAM/	Oracle BAM installation	Task 17–4 Task 19–6 Task 20–6	(Case-sensitive)	http://corpserver.peoplesoft.com/ORACLEBAM/
Installed Dashboard Product Code		Task 19–2		RBD
Web profile	PIA setup	Task 19–1		PROD
Authentication domain	Task 19–1			.mydomain.com <b>Note.</b> Include the initial period.
JNDI_URL		Task 19–2		t3://JMShost.peoplesoft.com:8000
Gateway URL value http://<PIA webserver>:<port>	PIA Web server installation	Task 19–5 Task 20–4		http://corpserver.peoplesoft.com:9600
IP address or machine name of the machine that hosts the JMS Server		Task 19–4		JMShost.peoplesoft.com
JMS client messaging driver (a jar file)	JMS server	Task 19–8		weblogic.jar
My Dashboard Content Reference ReportID parameter value	ReportDef value from task 20–2	Task 20–6		26
Network user ID that is the super user in the Active Data Cache (ADC). This is the user ID used to install the system.		Task 21–1	(case-sensitive)	PEOPLESOFT\AppDataInstaller
PIA URI		Task 20–4		http://corpserver.oracle.com/pxp/CRM/s/
Gateway listening connector	Task 20–6	Task 20–6		http://corpserver.peoplesoft.com/PSIGW/httpListeningConnector
Default Local Node	Task 20–6	Task 20–6 Task 21–2		PSFT_CR

Parameter Name and Description	Where obtained	Task where needed	System Value	Example
version of PeopleSoft.BAM.Custom.GroupGetter.dll	Task 21-1			3.4.4812.0
version number of PeopleSoft.BAM.Custom.SignOn.dll	Task 21-2			3.4.4812.0
DASH_DOMAIN	Installation of Oracle BAM	Task 20-1		adchost.peoplesoft.com

This table lists the product codes for task 18-3, Enabling Parallel Message Processing:

Dashboard Product	Product Code
Common Dashboard	<i>RBD</i>
Sales Dashboard	<i>SLD</i>
Order Capture Dashboard	<i>OCD</i>
Service Dashboard	<i>SDB</i>



## APPENDIX B

# Reviewing the Dashboard-Installed Component Default Locations

This table lists the locations of application components that you or others may reference. Enter locations that you modify from the default in the empty column:.

Component	Default Location	Actual Location
Log files for Dashboard object install	C:\temp\dash_install	
Oracle BAM Start Page application machine	C:\OracleBAM\BAM	
web.config	C:\OracleBAM\BAM	
SingleSignon.txt	<PS_HOME>...setup\rts_dashboard\install	
PeopleTools installation directory	<PS_HOME>...setup	
User projects in JMS server	C:\bea\user_projects\domains\peoplesoft1 under the WebLogic configuration	





## APPENDIX C

# Understanding Dashboard System Architecture and Process Flow

This appendix discusses:

- Understanding Dashboard and CRM Process Flows
- Reviewing Process Flow from the PeopleSoft CRM Application to the Dashboard
- Process Flow from the Dashboard to the PeopleSoft CRM Application

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## Understanding Dashboard and CRM Process Flows

Dashboard reporting depends on continuous access to sales, field service, and general business data to deliver accurate and relevant representations of current business activities. CRM data provides raw data for Dashboard reports, which are generated by Oracle BAM services based on CRM data loaded into the Oracle BAM database. Oracle BAM subscribes real-time messages from CRM receiving that are relevant to CRM; data such as customer, contact center, sales, and order capture information.

This appendix describes the flow of the two messaging systems involved:

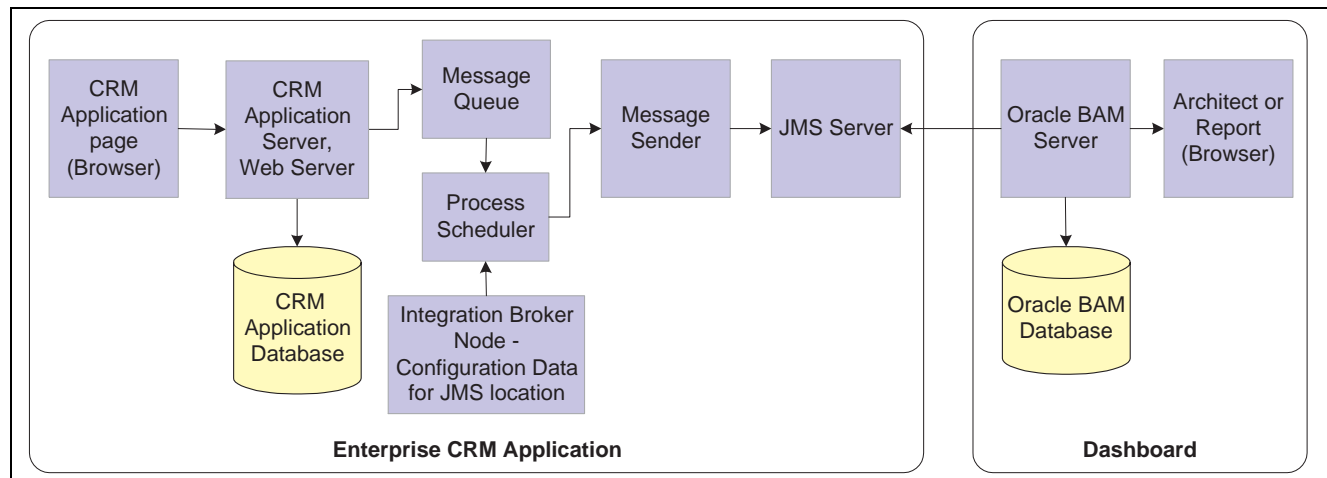
- PeopleSoft Enterprise CRM to Oracle BAM Dashboard.
- Oracle BAM Dashboard to PeopleSoft Enterprise CRM.

---

## Reviewing Process Flow from the PeopleSoft CRM Application to the Dashboard

When a data object in the CRM Application page changes, as when a support representative updates a case and saves it, the CRM Web Server passes the newly submitted data to the CRM Application Server.

This diagram illustrates the components involved in the messaging from a CRM application to Dashboard:



Messaging from CRM application to Dashboard

The CRM Application Server responds by:

- Saving the changed data to the CRM Application Database.
- Packaging key data in a message and placing it in the Message Queue.

The Process Scheduler processes the message in the queue, using configuration data stored in the Integration Broker Node definition to determine the target URL of the JMS server.

The Process Scheduler invokes the Message Sender, which sends the message to the JMS server.

The Oracle BAM Plan Monitor service, which runs on the Oracle BAM server, obtains the JMS server location from the Enterprise Message Source (EMS) definitions. Plan Monitor service fetches messages from the JMS server for each monitored plan.

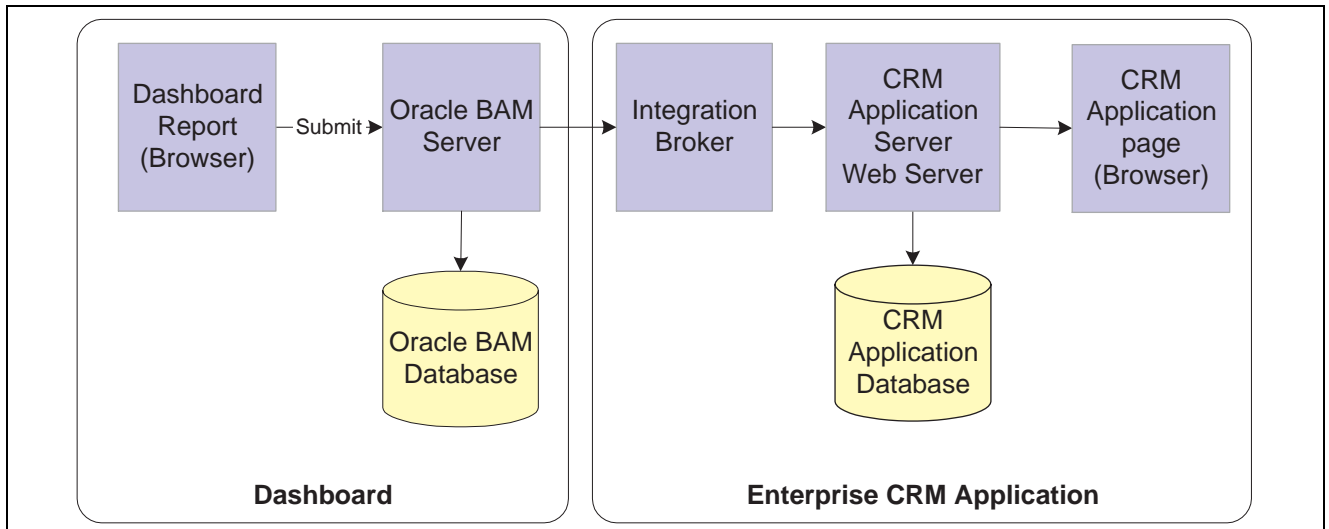
The Active Data Cache (ADC) service running on the Oracle BAM server updates the appropriate data objects in the Oracle BAM database.

The help desk manager, opening a Dashboard report for case life cycles, views data that includes the case just updated. Users can also view real-time data in Oracle BAM Architect.

## Process Flow from the Dashboard to the PeopleSoft CRM Application

After studying the weekly case activity Dashboard Report, a help desk manager shifts case assignments from one support representative to another. The agents involved will be notified of their reassignments by the CRM HelpDesk workflow function. The messaging system performs the task of the required data transfer from the Dashboard to the CRM application.

This diagram illustrates the components involved in the messaging from Dashboard to the CRM application:



Messaging from Dashboard to CRM application

Submitting the new case assignments causes the ADC service running on Oracle BAM server to insert rows into the data object stored in the Oracle BAM database. An alert that is set to watch the data object is triggered, and the Event Engine service running on the Oracle BAM server sends a message to the Integration Broker on the PeopleSoft CRM application side.

The Integration Broker triggers the execution of message subscription code on the CRM Application server, updating the appropriate objects in the CRM Application database and initiating changes to the workflow. New entries in the worklists of the two agents (viewed from a CRM Application page) inform them of their changed case assignments.



## APPENDIX D

# Reviewing Tablespaces and Parameters for PeopleSoft Enterprise CRM Online Marketing

This appendix discusses:

- Understanding PeopleSoft Online Marketing Tablespaces
- Reviewing Customer Data Model Tablespaces
- Changing Parameter Values
- Reviewing Parameter Descriptions
- Communication Port List for OLM Components

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## Understanding PeopleSoft Online Marketing Tablespaces

The following table lists and describes the PeopleSoft Enterprise Online Marketing 9 (OLM 9) tablespace names:

OLM 9 Tablespace Name	Tablespace Description
RYAPP	General tablespace where most of the application-specific data is stored.
RYWORK	Tablespace for OLM dedup tables. Dedup tables are used for Mailcaster to prepare the broadcast emails in the Oracle system.
RYLARGE	Tablespace for the PS_RY_EM_DAY_CNT_1, PS_RY_EM_DAY_CNT_2, and PS_RY_FREQ_CNT tables and the RY_FLOW_INST, RY_DOC_SER, and Document transaction tables.
RYLARG1	Tablespace for indexes on the PS_RY_BEMAIL_LOG, PS_RY_EMAIL_BOUNCE, PS_RY_EXP_EM_LOG, PS_RY_SMAIL_LOG, PS_RY_EMAIL_DISC, PS_RY_OPENMAIL_LOG, and PS_RY_VC_EM_IMPR tables. These tables contain email transaction history data.

OLM 9 Tablespace Name	Tablespace Description
RYLARG2	Tablespace for the PS_RY_WEB_LOG and PS_RY_VC_WEB_IMP tables. These tables contain web transaction history data.
PSINDEX	Tablespace for indexes of all OLM tables in the Oracle system.

## Reviewing Customer Data Model Tablespaces

In addition to the specific tablespaces used by PeopleSoft Enterprise OLM, some of the tablespaces within the PeopleSoft Enterprise CRM Customer Data Model also need to be resized to handle the large growth of individuals and organizations. This table lists and describes these tablespaces:

Tablespace Name	Tables Affected by OLM Growth	Comments
RBLARGE	<ul style="list-style-type: none"> <li>• PS_CM</li> <li>• PS_BO_CM</li> <li>• PS_BO_CM_USE</li> <li>• PS_BO_ROLE</li> <li>• PS_BO_REL</li> <li>• PS_BO</li> <li>• PS_BO_MKT_DATA</li> <li>• PS_BC</li> <li>• PS_BO_NAME</li> <li>• PS_BO_TRIGGER</li> <li>• PS_RD_PERSON</li> <li>• PS_RD_COMPANY</li> </ul>	Many other tables use this tablespace, but its size will be greatly affected by PeopleSoft Enterprise Online Marketing transactions.
PSINDEX	Index tablespace for: <ul style="list-style-type: none"> <li>• PS_CM</li> <li>• PS_BO_CM</li> <li>• PS_BO_CM_USE</li> </ul>	
RABLARGE	PS_BO_BASIC_IND PS_BO_BASIC_ORG	
RABINDEX	Index tablespace for: PS_BO_BASIC_IND PS_BO_BASIC_ORG	

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**Note.** Make sure each of the tablespaces above is properly sized and active.

---

## Task D-1: Changing Parameter Values

If you change the value of any parameters from the PIA Settings page or you change and overwrite the value of Settings in any of the components configuration file (for example, DES.config, MCR.config, WDG.config, and ERP.config), you will need to stop and restart the components affected by the parameter for the new setting to take effect.

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**Note.** Script files for local use must be used to configure the email response processor. The syntax of the scripting language is covered in the Email Response Processors Documentation.

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## Task D-2: Reviewing Parameter Descriptions

The following tables describes the PeopleSoft Enterprise Online Marketing parameters. The first table includes parameters for DES, Mailcaster, and All, and the second table includes parameters for Watchdog. The parameters are in alphabetical order within each table. It also indicates the PeopleSoft Enterprise Online Marketing component that uses each parameter.

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**Note.** If you change the value of any parameters, you will need to stop and restart the components affected by the parameter for the new setting to take effect.

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Parameter Value	Components	Description
agingCacheLifeSpan	DES	For internal use only.
agingObjectAgeLimitMins	DES	For internal use only.
allowOwnRmiRegistry	Mailcaster	Start own RMI registry if none is running already.
automaticMailJobRecovery	Mailcaster	<p>Specifies whether the Mailcaster will try to automatically recover a running job that has not been updated for a specific period of time.</p> <p>If set to <i>false</i>, the Mailcaster does not attempt to recover the mail job, and the administrator must do so manually by stopping and starting the job using the Control Center.</p> <p>If set to <i>true</i>, the Mailcaster recovers the job, which might result in the sending of duplicate emails. The Mailcaster uses the mail jobs recovery log table to reconstruct the job.</p> <p>However, because there is a gap between the sending of the mail and writing to the recovery log, it is possible that, at most, one duplicate message will be sent per send mail thread.</p> <p>The default value is <i>true</i>.</p>
broadcastRequestDESTimeout	DES	Timeout in milliseconds for broadcast request.
bulkMailerDropDedup	Mailcaster	Specifies whether to drop the Dedup table after mail job has completed successfully. The default is <i>true</i> .

Parameter Value	Components	Description
bulkMailerMaxErrorRetry Attempts	Mailcaster	Specifies the number of tries the Mailcaster will attempt to connect to the SMTP server before raising an error. (Note that the misspelled word “Attempts” must be entered as shown.)
cgiProgramPath	All	Specifies the path of the web server gx.cgi program. The default is DCS. Also used by OLM to tell the Campaign Server to clear the cache and to generate the Dialog Link Report.  To ensure that the path information is read correctly at startup, you should set this value in the configuration files rather than using the Settings feature in the Online Marketing Client.
clearCacheGracefully	DES	Method of clearing the cache.
clearCachePerObject	DES	Method of clearing the cache deeply.
clearCacheThreads	DES	Number of threads that clear cache in background.
clearCacheTimeoutSecs	DES	Time, in seconds, for a clear cache request to time out.
clearCacheWait	DES	Time, in milliseconds, to wait for current clear cache requests to finish.
companyBasicsProfileName	DES	For internal use only.
contactBasicsCompanySysId ElementName	DES	For internal use only.
contactBasicsProfileName	DES	For internal use only.
ConnectId	All	DB User Name
ConnectPswd	All	DB User’s password
contentTransferEncoding	Mailcaster	Allows the email header to support 8bit characters. The default for email header is 7bit. To change the default, add this parameter through the Online Marketing Client in Settings as contentTransferEncoding=8bit.
createObjectsInExternal Thread	DES/ERP	Create and destroy Jolt Connection in a separate thread.
dialogmoverOperation Timeout	DES	Dialog Mover execution timeout. (60*1000=i minute)
dedupDisablePageLock MSSQL	DES	Avoids page locking on MSSQL while de-duping (experimental).
debugFileSeverityThreshold	All	The debug log error severity level.(not including trace lines).



Parameter Value	Components	Description
dbServerURL	All	How the OLM components connect to the database: <ul style="list-style-type: none"> <li>MSSQL: jdbc:sqlserver://host:port;DatabaseName=instance;sql70=true;charset=Cp1252</li> <li>ORACLE: jdbc:oracle:thin:@host:port:instance</li> <li>DB2UDB: jdbc:db2://host:port/instance</li> </ul>
dbVendor	All	The database you are using: MSSQL, ORACLE, or DB2UDB.
dedupAllowDirtyRead MSSQL	DES	(MSSQL only) Specifies whether to allow dirty read on the PS_RY_BASIC_IND table during de-duping. The default value is <i>false</i> .  When the parameter is set to <i>false</i> , the de-duping process gets clean data but can block other components from updating the basics individual table. When it is set to <i>true</i> , the de-duping process gets dirty data, allowing a higher level of concurrency on the basics individual table.
dedupIndexSpace	DES	Specifies the database tablespace in which the dedup index tables are created. This parameter can be used to improve the performance of the system. Contact your database administrator for more information.
dedupPickRecordWithMax CompanySysID	DES	Takes effect only when de-duping on BO_ID (Unique System ID) and at least one of the audiences is of type Contact. The default value is <i>true</i> .
dedupTableSpace	DES	Specifies the database tablespace in which the dedup tables are created. This parameter can be used to improve the performance of the system. Contact your database administrator for more information.
defaultDateFormat	All	Default date format with values like “DD/MM/YYYY.”
defaultProcessSize	DES	Specifies the maximum number of actions that can be created in the Reach or Response side of the process tree. The default value is 200.
DefaultTimeFormat	All	Default time format. Possible values are: “HH:MM” or “HH:MM AM/PM.”
defaultURLBase	DES /Mailcaster	Specifies the base of the URL that the Campaign Server and Mailcaster adds to all links. The format is: defaultURLBase=<URL of online dialog webserver>
delayForDBCcheck		The number of seconds DES waits before attempting a database connection, to prevent it from starting before the database is available.  This parameter applies only at database initialization. The default is 15 seconds.
directURLBase	DES	Direct URL of the DES (http://<hostname>:port).
domainName	DES /Mailcaster	The domain name, which identifies your site on the internet. For OLM, this is yourdomain.domain.

Parameter Value	Components	Description
doNotEMailDefault	DES /Mailcaster	Specifies the default value to be stored in the people profile (in the Do not email field) when a new contact record is added. If it is <i>true</i> , then new contacts will not be contacted through bulk email. If it is <i>false</i> (the default), then contacts may be contacted. This default value can be overridden by the dialog process or respondent input.
doNotEMailProfileElement Name	DES /Mailcaster	For internal use only.
emailAddressProfileElement Name	DES	The name of the Email Address profile field in the Individuals.People profile (default value: Email).
errorFileSeverityThreshold	All	The error log severity level.
eventWireGifFileName	DES	Customize the DES default 1x1 clear gif file.
extensionsDir	DES /Mailcaster	The directory where the Live Extension servlet jar files exist.
extensionTimeout	DES	Extension execution timeout.
heartbeatInterval	DES	Heartbeat interval of life cycle management.
https	DES	Indicates whether connections to the Control Center must be secured. If you want to require secure connections, you must set <i>https=On</i> . Any other value (including <i>on</i> with a lowercase <i>o</i> ) indicates that secure connections are not required.
httpSessionTimeoutMins	DES	The logged-in session timeout in minutes in the range of 1 to 60 minutes.
jpmWaitForShutdownIn Minutes		Delay from last action when the Java Process Monitor will shut itself down.
isDebugOutputToHTML Enabled	DES	For internal use only.
jmsContextFactory	DES	JMS Context Factory
jmsProvider	DES	Vendors of web server software. Possible values are BEA-WLS and IBM-WAS.
jmsProviderUrl	DES	JMS provider URL
jmsQueueConnection	DES	JMS queue connection
jmsServiceLocator	DES	JMS service locator
jmsTopicConnection	DES	JMS topics connection
jmsUser	DES	JMS user
jmsUserPassword	DES	JMS user password

Parameter Value	Components	Description
jdbcDriver	DES /Mailcaster	The JDBC driver that the OLM components use to access the database. Default values are: <ul style="list-style-type: none"> <li>• MSSQL: com.microsoft.sqlserver.jdbc.SQLServerDriver</li> <li>• ORACLE: oracle.jdbc.driver.OracleDriver</li> <li>• DB2UDB: com.ibm.db2.jcc.DB2Driver</li> </ul>
jobRecoveryExpireInHours	Mailcaster	The time period, in hours, after which mail jobs will not be recovered. The default is 96 and the parameter must be set to a value greater than 0. This parameter is useful in cases with time-sensitive audiences or time-sensitive content for a mailing.
joltSessionRecycleCount	DES	The number of requests for which the Jolt NetSession will be reused before it is closed. After a Jolt NetSession is closed, a new one will be created as needed. The default value is 0, meaning that the Jolt NetSession never expires.
largeJobOnly	Mailcaster	If the mailcaster is a large mailcaster and this value is set to true, then the mailcaster will only pick up large jobs. The default is false (should be one per mailcaster config file).
localHostName	DES /Mailcaster	Used in communicating with SMTP mail servers. It should be the host name of the machine where the Mailcaster is running.
logBaseName	All	The prefix for log and error files, such as DES, WDG, and so on (should be one per application config file).
logPath	DES /Mailcaster	Specifies the directory for the log file. The default is the current working directory.
numberFrequencyCheck Threads	Mailcaster	The number of threads to use to process frequency counter checking.
numberRenderingThreads	Mailcaster	The number of rendering threads.
mailCasterMaxGettransaction Retry	Mailcaster	Number of times to attempt to get a database transaction (connection) before giving up.
maxBulkMailMessages PerHour	Mailcaster	When OLM components are sharing a mail server with other users, you might want to limit the number of emails each Mailcaster sends per hour. For example, if you have three Mailcasters and you set this parameter to 100, each Mailcaster will send out a maximum of 100 messages per hour, for a total maximum of 300. The default setting is 0, which means no limit.
maxDESInstances	DES	The number of DES servers in the cluster.
maxMailQueueSize	Mailcaster	The size of the mailcaster internal message queue.
maxFrequencyCheckQueue Size	Mailcaster	The maximum size to allow the queue of messages awaiting the frequency counter checking to grow to.

Parameter Value	Components	Description
maxJobSize	Mailcaster	The maximum size for a child mailjob. The default value is 10000, and the parameter must be set to a value greater than that set for minJobSize.
maxLogFileCount	DES /Mailcaster	Defines the maximum number of log files to create. The default setting is 10.
maxLogFileSize	DES /Mailcaster	Defines the maximum size of the log files in bytes. The default setting is 10 MB.
maxPooledGenericThreads	DES	Maximum number of Generic Threads that are used by Scheduler and Broadcaster.
maxRenderMailQueueSize	Mailcaster	Maximum number of messages in the rendering queue.
maxRetriesForDBCheck	DES	The number of times DES tries to establish connection with the database, to prevent it from starting before the database is available. This parameter applies only at database initialization. The default is 8 times.
maxSendMailQueueSize	Mailcaster	Maximum number of mails in the send queue.
maxThreads	DES	The maximum size of the Live Extention pool.
maxUploadSize	DES	Maximum file upload size.  You should consult your web server documentation when setting maximum file size to ensure that the settings are compatible between the web server and OLM. If the web server settings are significantly higher than those of OLM, performance can be adversely affected.
minJobSize	Mailcaster	The minimum size for a child mailjob. The default value is 2000, and the parameter must be set to a value greater than 0 and less than maxJobSize.
OMKDESDestination	DES	JMS Destination (TOPIC/QUEUE) for DES.
orgRoleTypeIdProfile ElementName	DES	Name of the organization role type profile element in base language.
percentageJobSize	Mailcaster	The percentage of a large (parent) job to use as a child job size. The default value is 3, and the parameter must be set to a value greater than 0.
pollingInterval	Mailcaster	Specifies how often, in minutes, the Mailcaster checks the mail job queue. The default setting is 1.
preloadCampaign	DES	Specifies the names of dialogs to be loaded into memory at server startup, thus reducing the time the customer must wait to view the dialog. The format is:  preloadCampaign=Dialog1,di⇒ alog 2,Dialog33 for⇒ Staging  You can specify multiple dialogs by separating their names (including spaces) with commas; do not include a space before or after the commas.

Parameter Value	Components	Description
psAppServerURL	DES	Specifies the URL of the PeopleSoft Application Server and JOLT port where publish/subscribe is enabled.  For failover, you can use a comma-separated list. For example: //mymachine1:9000, //machine2:9050  This parameter is usually set in the Online Marketing Client's Settings.
psIBLocalNode	DES	Specifies the name of the Integration Broker default local node for the Application Server.
psIBLocalNodePassword	DES	Specifies the password (if any) for the Integration Broker local node. The value is encrypted in the configuration file.
psJoltSessionCount	DES	Specifies the maximum number of JOLT sessions. The DES will pre-allocate half at startup.
psOperatorID	DES	Specifies the PeopleSoft user ID. Choose a user ID with the PeopleSoft Administrator role, such as the OLM user.
psOperatorPassword	DES	Specifies the PeopleSoft user password.
psPIAServerURL	DES	CRM PIA Server URL: http:// <PIA web server:port>
psPIAServerWebsiteName	DES	CRM PIA server website name.
psToolsRel	DES	Specifies the PeopleTools version number. The default value is 8.48, which is specified in the Online Marketing Client's Settings.
restoreCheckInterval	DES	Specifies the interval in milliseconds between checks to see whether an object is fully restored or not. The default is 100 ms.
rmiPort	Mailcaster	Specifies the port on which RMI can be contacted. The default is 1099.
roleTypeIdProfileElement Name	DES	Name of the individual role type profile element in base language.
schedulerFailInterval	DES	Specifies the amount of time, in hours, the scheduler should wait before assigning a FAILED status to a mail job. The default is 24 hours. If a job is likely to take longer than 24 hours to dedup, this parameter should be added to the DES.config file with a longer duration.
schedulerServiceNumber OfJobs	DES	Number of jobs that can be run per scheduler wake-up.
schedulingTimeoutMins	DES	The maximum value is 30 minutes and the minimum is 5 minutes. If any event is being scheduled, that is, the state is SCHG (scheduling) for more than the set value, then the scheduler recovers this events and resends it for processing.
signatureAlgorithmKey	DES /Mailcaster	Specifies the encryption algorithm key used for the magic number. The key must be between 15 and 2^63 digits. If the key is not set or is set incorrectly, a default value is used.

Parameter Value	Components	Description
signatureLength	DES	Specifies the length of the signature in bits, from 0 to 48 (0 = no signature). The default length is 48.
smallAudienceThreshold	DES	Specifies a threshold number of contacts in an audience. Below this number, OLM uses a small Mailcaster to send email. The default is 100.
smallAudienceThreshold	Mailcaster	If the maxJobSize is larger than the smallAudienceThreshold, the Mailcaster will work on large jobs as its first priority. If the maxJobSize is less than or equal to the smallAudienceThreshold, the Mailcaster will work on small jobs as its first priority.
smallJobOnly	Mailcaster	Specifies whether the Mailcaster will only try to process small jobs (jobs below the threshold set by the smallAudienceThreshold parameter). If set to <i>True</i> , the Mailcaster will only process small jobs.  This parameter is ignored if the maxJobSize parameter is greater than or equal to the smallAudienceThreshold parameter.
smtpServerNames	DES /Mailcaster	Specifies a semicolon-separated list of SMTP mail servers that are used by the Online Marketing server and the Mailcaster. It has the following format:  <code>hostName[:portNumber] [:threads=n][;...]</code>  The normal SMTP port number is used if <code>portNumber</code> is not provided. <code>threadCount</code> is used only by the Mailcaster to determine how many internal threads will be used to send mail to the SMTP server.  Examples: <ul style="list-style-type: none"> <li>• <code>mail1.pscrm.com</code> Uses one mail server on mail1.pscrm.com.</li> <li>• <code>mail1.pscrm.com;mail2.pscrm.com</code> Uses two mail servers, one on mail1.pscrm.com and another on mail2.pscrm.com.</li> <li>• <code>mail1.pscrm.com:1025;mail2.pscrm.com:1025</code> Uses two mail servers on port 1025, one on mail1.pscrm.com, and the other on mail2.pscrm.com.</li> <li>• <code>mail1.pscrm.com:threads=5</code> Uses five connections to mail1.pscrm.com.</li> <li>• <code>mail1.pscrm.com:25:threads=5; mail2.pscrm.com:25:threads=3</code> Uses five connections to mail1.pscrm.com on port 25 and three connections to mail2.pscrm.com on port 25.</li> </ul>
smtpThreadPollingInterval	Mailcaster	Specifies how long in minutes the Mailcaster's threads wait before reconnecting to the SMTP server after being disconnected. The default is 10 minutes.
threads	Mailcaster	Number of send mail threads.

Parameter Value	Components	Description
transactionPoolDelay InMinutes	DES /Mailcaster	Specifies how often the DES checks the thread pool for stale database connections (value in minutes). The default is 5; allowable values are 1 through 60.
transactionPoolMaxSize	DES /Mailcaster	The maximum number of database connections to be pooled. The number of connections may exceed this value, but those connections will not be pooled. The default is 20; allowable values are 0 through 200. Setting this value to 0 means unlimited pool size.
transactionPoolMinSize	DES /Mailcaster	The initial database connection pool size. This value must be less than connectionPoolMaxSize. The default is 1; allowable values are 0 through 199.
transactionPoolStale InMinutes	DES /Mailcaster	Amount of time idle connections should remain in the pool (value in minutes). The default is 20; allowable values are 0 through 1440 (24 hours).
trimSpaces	DES	Allows the leading and trailing blanks to be stripped from text fields. The parameter applies to all text fields—either all or none are stripped. Valid values are <i>true</i> and <i>false</i> . The default value is <i>true</i> .
uploadInMemorySize	DES	Location of temporary storage for uploaded files.
uploadTempStorage	DES	Sets the size threshold beyond which upload files are written to the temporary disk storage location.
useAutoUndoOracle	DES /Mailcaster	Boolean flag to indicate whether the Oracle database is in automatic undo mode or not. The default value is <i>false</i> .
useJoltRetry	DES	Tells netSession API to use Jolt retry. By default, this value is <i>false</i> . You should not modify it.
HAS_FIREWALL	Mailcaster	If a firewall is in use between the DES server and the Mailcaster, two parameters can be used to force the mailcaster RMI server object to listen on a specific port. Therefore, this parameter should be set to <i>true</i> and inserted into the MCR.config file.
FIREWALL_PORT	Mailcaster	If a firewall is in use between the DES server and the Mailcasters, two parameters can be used to force the mailcaster RMI server object to listen on a specific port. Add this parameter to the MCR.config file.

Parameter Value	Components	Description
daysInThePast	Watchdog	The period of time Watchdog should monitor failed or stopped jobs and events.
debug	Watchdog	Enable watchdog specific debugging. Values are <i>YES</i> and <i>NO</i> .
defaultHostName	Watchdog	The name of the machine that Watchdog is running on.
defaultRecipient	Watchdog	Recipient to use when testing the mail server.
defaultSender	Watchdog	The Sender to use on Watchdog mail reports.

Parameter Value	Components	Description
demoCampaignMagic Number	Watchdog	The magic number of the Online Marketing Dialog to use as test that the DES is running properly. This value should include “p=” along with the magic number. A good demo campaign contains a landing page and a final page.
domainName	Watchdog	The domain name of the machine that is running Watchdog. An example is “abc.com.”
expectedResponseAfterGet	Watchdog	A string for Watchdog to look for in the server’s response to a get. This string is part of the landing page.
expectedResponseAfterPost	Watchdog	A string for Watchdog to look for in the server’s response to a post. This string is the final page or a response to the submission of the landing page.
iAmAliveInterval	Watchdog	Time between “I am alive” messages.
iAmAliveMailList	Watchdog	A semicolon-separated list of email addresses to send “I am Alive” messages to. The “I am alive” message is to track that even if no error reports are being sent, Watchdog is still running.
iAmAliveSubject	Watchdog	The subject line to use for “I am Alive” messages.
interval	Watchdog	Number of minutes Watchdog sleeps between system checks. The default is 30 minutes.
logFileMaximumSize	Watchdog	The maximum size of a log file before it rolls over. Values can end in <i>K</i> or <i>M</i> to denote kilobytes or megabytes.
loops	Watchdog	Number of times that Watchdog will run a loop. A 0 (zero) means indefinitely. The default is 0.
machinesToPing	Watchdog	A colon delimited list of machines to ping. All required servers (database servers, mail servers, and so on) should be included in this list.
mailJobLastModifiedHours	Watchdog	Specify the maximum duration a mailcaster should take before updating the queued/sent counts (updated roughly every 50 mails). Hours, minutes, and seconds are totaled.
mailJobLastModifiedMinutes	Watchdog	Specify the maximum duration a mailcaster should take before updating the queued/sent counts (updated roughly every 50 mails). Hours, minutes, and seconds are totaled.
mailJobLastModifiedSeconds	Watchdog	Specify the maximum duration a mailcaster should take before updating the queued/sent counts (updated roughly every 50 mails). Hours, minutes, and seconds are totaled.
mailMax	Watchdog	The maximum number of attempts to send a report before giving up. The default is 5.
mailSendOutRate	Watchdog	The mailcaster send rate in mails per minute. If a mailcaster falls below this threshold, a warning is given.



Parameter Value	Components	Description
mailSendOutRateCheckInterval	Watchdog	Interval in minutes for running the mailSendOutRate. This value must be an even multiple of the interval parameter. For example, if the interval is 30, then this value should be 30, 60, 90, and so on.
maxMemorySize	Watchdog	The maximum memory setting for the DES server (that is, the <code>-Mx</code> Java command line argument used). Values can end in G for gigabytes, M for megabytes, K for kilobytes, or nothing, in which case bytes are assumed (for example, 64M).
maxTargetListDedupTime	Watchdog	Maximum time in minutes for a dedup to run. This value must be an even multiple of the interval parameter. For example, if the interval is 30, then this value should be 30, 60, 90, and so on.
memoryAlertPercentage	Watchdog	The percentage of maximum memory used before sending a warning. For example, if set to 50 and the maxMemorySize is 64M, then memory use beyond 32 megabytes would register as a failure.
numberOfBackUps	Watchdog	The number of backup log files.
ping	Watchdog	Enables a ping test in Watchdog. The ping validation tells if a host is operating. Values are <i>YES</i> and <i>NO</i> . The default is <i>YES</i> .
pingCommand	Watchdog	The ping command for the system. This command should use the full path and not assume the use of the <i>PATH</i> variable.
pingMax	Watchdog	The number of times Watchdog will attempt to ping a server before giving up. The default is 20.
pingOkString	Watchdog	The beginning text of a successful response from the ping command. The default is <i>Reply from</i> .
pingTimeoutCmdPosition	Watchdog	Relative position of the ping timeout to the host name. Values are <i>front</i> or <i>v</i> . On Win/NT, use <i>front</i> for ping <code>-w 30 hostname</code> and on UNIX, use <i>rear</i> for ping <code>hostname 30</code> .
pingTimeoutCommand	Watchdog	Argument to pass to ping command to specify a timeout. On Win/NT, this should be <code>-w</code> to make the used ping command ping <code>-w 30 hostname</code> . On UNIX, do not set this value.
pingTimeoutValue	Watchdog	Number of milliseconds the ping will wait for a response (timeout done by ping command). The default is 30 milliseconds.
pingWait	Watchdog	The number of milliseconds between consecutive ping commands. The default is 15,000 milliseconds.
qkLookPort	Watchdog	<p>The port number Watchdog will use for the quick status report. The default is 6700.</p> <p>To get the report, open a connection from a browser to this URL: <code>http://&lt;host&gt;:&lt;qkLookPort&gt;</code> (for example, <code>http://foo.abc.com:6700</code>). This connection will return a copy of the last report sent. It will also wake Watchdog if it was sleeping to run the validation again.</p>

Parameter Value	Components	Description
queryToSubmit	Watchdog	A URL-encoded query that Watchdog sends to the web server. This query includes form fields from the landing page of the demo dialog. An example value is: "First\$Name=foo&Last\$Name=bar&johnDrake=xxx"
queuedEventMinusDays	Watchdog	Specify the maximum duration a mail job should be in a queued state. The days, hours, and minutes are totaled.
queuedEventMinusHours	Watchdog	Specify the maximum duration a mail job should be in a queued state. The days, hours, and minutes are totaled.
queuedEventMinusMinutes	Watchdog	Specify the maximum duration a mail job should be in a queued state. The days, hours, and minutes are totaled.
queuedMailcasterMinusDays	Watchdog	Specify the maximum duration a mail job should be in a queued state. The days, hours, and minutes are totaled.
queuedMailcasterMinusHours	Watchdog	Specify the maximum duration a mail job should be in a queued state. the days, hours, and minutes are totaled.
queuedMailcasterMinusMinutes	Watchdog	Specify the maximum duration a mail job should be in a queued state. The days, hours, and minutes are totaled.
returnPath	Watchdog	The return path for Watchdog reports. It should be a valid mailbox because bounced mails will come to this address.
rmi	Watchdog	Specify if Watchdog should use RMI to check mailcaster process status.
rmiPort	Watchdog	The port to use for RMI connections to the mailcasters. The default is 1099.
runningEventMinusDays	Watchdog	The maximum time the scheduler should take to update a campaign event state. The days, hours, and minutes are totaled.
runningEventMinusHours	Watchdog	The maximum time the scheduler should take to update a campaign event state. The days, hours, and minutes are totaled.
runningEventMinusMinutes	Watchdog	The maximum time the scheduler should take to update a campaign event state. The days, hours, and minutes are totaled.
sentOverQueuedRatio	Watchdog	Check for number of mails sent compared with mails queued. For example, "SentMessages < sentOverQueuedRatio * QueuedMessages". Due to bad email addresses, the number of mails sent should always be lower than that queued. However, a large discrepancy may be a warning of poor data integrity or failing mail servers.
service	Watchdog	Write debug information to a log file or to the screen. Values are <i>YES</i> to write to a log file and <i>NO</i> to write to the screen.
showMemoryUsageInErrorMsg	Watchdog	Show memory use in the Watchdog report. Values are <i>YES</i> and <i>NO</i> . The default is <i>NO</i> . While more informative, it will cause the Watchdog reports to be sent out more often because reports are sent when the report contents change. When showing the actual memory in use, it will probably change with each run.

Parameter Value	Components	Description
socketTimeout	Watchdog	Number of seconds before Watchdog stops waiting for a response on a socket. A Timeout of 0 will never cause a connection to timeout. The default is 60 seconds.
timeDifference	Watchdog	Waiting time, in milliseconds, for Watchdog between launching two series of tests. The default is 1000 milliseconds.

## Task D-3: Communication Port List for OLM Components

This table details the communications between OLM components:

Communication Direction	Port for	DES Configuration Parameter	Value	Port Default Value
DES to PS Application Server	JOLT	psAppServerURL	//<appserv host>: <jolt port>	none
DES to PIA	PIA HTTP	psPIAServerURL	http:// <CRM PIA web server:port>	none
DES and PIA to FTP Server	FTP Site	PeopleTools->Administration->URLs ->URL Identifier: RY_ATTACHMENTS	ftp://[user ID:pwd@]<host name>[:prot]/[path name]	21
PIA to DES	DES HTTP and HTTPS	URL for IB node PSFT_OLM	http://<des webserver>:port /DCS/DlgBroker	none
End User to DES		defaultURLBase	http://<des webserver>:port /DCS/mcp?p=...	none
DES Clustering	loadbalancer	jmsProviderUrl	t3://<loadbalancer ip : loadbalancer port>	none
		directURLBase	http://<des webserver: not loadbalancer port>	none
DES to Mail Service or Process Scheduler to MCR, WDG and ERP	RMI	rmiPort	[number]	1099
DES to Mail Service or Process Scheduler	RMI	HAS_FIREWALL	true/false	false
		FIREWALL_PORT	[number]	none

<b>Communication Direction</b>	<b>Port for</b>	<b>DES Configuration Parameter</b>	<b>Value</b>	<b>Port Default Value</b>
DES, MCR, WDG and ERP to Database Server	Database	dbServerURL	MSSQL:jdbc:sqlserver://serverName:port;DatabaseName=instance;sql70=true;charset=Cp1252  ORACLE: jdbc:oracle:thin:@host:port:instanceDB2UDB:jdbc:db2://host:port/instance	MSSQL: 1433
Mail Service to SMTP	SMTP	smtpServerNames	<SMTP hostName>[:portNumber]	25
	POP account			110
WDG	WDG	qkLookPort	http://<wdg_host>[:qkLookPort]	6700

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